



## ACCREDITATION GUIDELINES FOR COURSE PROVIDERS

### Life and Accident & Sickness

#### Definition of Continuing Education

Continuing education for a Life and/or Accident and Sickness licensee must be directly related to life and accident and sickness insurance products or services, or the operation of an insurance business.

A maximum of 5 CE credits of the required 15 may be related to segregated funds. This maximum of 5 may include investment related education if it is directly applicable and relevant to segregated funds.

Content excluded from allowable CE credits are programs based on sales production, promotion, motivation, computer training, and any education not related to products or activity for which the licence is held.

Allowable content would include ethics, errors and omissions coverage and compliance with insurance related legislation and regulatory requirements both Provincial (Manitoba) and Federal (e.g. Code of Conduct, the Insurance Act, Rules and Regulations, privacy legislation, anti-terrorism or money laundering legislation, and replacement requirements).

- The number of hours of acceptable continuing education must be attested to in writing by a program provider and is measured by the actual time spent in attendance at a program or, where a program is not provided in a face-to-face setting, the time designated by the program provider for completion of a program.
- The program must have a classroom time of one (1) hour or more to be eligible for accreditation.
- The program must be presented by a qualified instructor, leader, or lecturer.

#### Accreditation Standards and Accredited Course Providers

The following key guidelines will assist in determining who may qualify as an Accredited Course Provider.

Professional Development Activities include courses, seminars, and meetings sponsored by Insurance Companies and Industry Organizations. These include, but are not limited to:

- ADVOCIS – The Financial Advisors Association of Canada
- Canadian Institute of Chartered Accountants
- Canadian Life and Health Insurance Association (CLHIA)
- Canadian Institute of Chartered Life Underwriters and Chartered Financial Consultants
- Estate Planning Councils
- Independent Financial Brokers (IFB)
- Life Office Management Association
- Life Insurance Managers Association of Canada
- Life Insurance Marketing and Research Association
- Life Insurance Companies licensed to do business in the Province of Manitoba
- Manitoba Securities Commission

Providers who offer courses or programs that are designed to meet the Continuing Education requirements for agents should ensure that such courses are related to the technical aspects of life and/or accident & sickness insurance. Agents will require a document verifying completion of the number of hours that they have spent which count towards meeting the Continuing Education requirement. By maintaining course records for a period of two (2) years, course providers will be able to assist agents by responding to their enquiries.



### **Course Providers:**

- must undertake a regular evaluation of course content to monitor the quality of the material and ensure it meets current industry standards.
- are responsible for verifying the qualifications of individual instructors and monitoring their continued effectiveness in the delivery of the material.
- are responsible for having and maintaining attendance registers for ICM verification. You must have individuals sign your attendance registers.

### **Assigning Credit Hours**

In order for an Accredited Course Provider to properly assign credit hours to a particular course, the following steps must be followed:

1. Assign one credit hour for each hour of actual course time. These must be allocated based on eligible continuing education course content as per the above definition of continuing education.
2. If the course is scheduled for eight hours, but ends after four hours, the course is eligible for four credit hours.
3. If an eight hour course ends a half hour early, it is allowable to grant eight credit hours. If a course ends more than a half hour earlier than it was scheduled to end the credit hours given must be reduced to the actual hours the course lasted.
4. Course leaders, instructors or moderators are eligible to receive **two** credit hours for each hour the course has been approved.
5. Instructors and course providers must never allow certificates to be signed and given to a licensee who did not attend for the full credit hours shown. If a licensee must leave early, it is permissible to issue a certificate for the actual credit hours earned.

### **Certificates**

Certificates must be issued to a participant immediately this means within a reasonable period of time. A participant should not be requesting their certificate 30 days or more after the seminar/course is complete and providers should be in a position to mail them out within a week of the course completion.

Certificates will only be accepted by ICM if they include the following information:

- attendee's name
- name of the seminar/course provider
- number of ICM credit hours
- name of the seminar/course
- date of the seminar/course

If an agent presents a certificate to us and it is missing any of the above noted bullets, we will simply advise the agent that the certificate is not valid as it is incomplete.

Failure to include the above bulleted information will result in the revocation of your course provider status.



**APPLICATION TO BECOME AN ACCREDITED COURSE PROVIDER**

**TO:** The Insurance Council of Manitoba  
466 – 167 Lombard Avenue  
Winnipeg, Manitoba R3B 0T6

**FROM:** *PRINT OR TYPE FULL BUSINESS NAME and ADDRESS:*  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

We hereby, apply to the Insurance Council of Manitoba for Accredited Course Provider status in the following licence class(es).  A&S  Life

Please check if seminar/course will be in-house or open to all agents  Open  In-house only

**If approved we agree to:**

1. Assign credit hours fairly and accurately in accordance with Council's Accredited Course Provider Guidelines.
2. Provide attendees with a Certificate of Attendance Form, clearly identifying that the individual named did attend and earned the number of ICM credit hours shown, providing the individual attended the full session. Must state how many ICM credit hours the seminar/course is worth.
3. Maintain a record of attendance for audit verification if required.
4. Ensure that the certificate(s) of attendance are factual, accurate and complete with the attendee's name and date of seminar/course.
5. Operate within the Accreditation Guidelines developed by Council which we read and understood.
6. Provide ICM with a Contact Person for Continuing Education. Change in the contact person will require the completion of a new application. We further understand should the contact person change we must notify Council with a new fully completed application.

In addition, ICM reserves the right to monitor the content and delivery of course/seminar material. From time to time you may be required to provide attendees with a seminar/course evaluation form which will be provided by the Insurance Council of Manitoba.

We further agree that, if at any time, Council should determine that we have not complied with our undertaking as set out in this agreement, Council may withdraw our Accredited Course Provider status and refuse to allow us to provide seminars/courses that may be eligible for credit hours.

\_\_\_\_\_  
Print Name of Contact Person

\_\_\_\_\_  
Position

\_\_\_\_\_  
Signature of Contact Person

\_\_\_\_\_  
Date

\_\_\_\_\_  
Telephone

\_\_\_\_\_  
Fax

\_\_\_\_\_  
E-mail

\_\_\_\_\_  
Website

All Accredited Course Providers will be posted on the Council's website indicating the organization's name, address, telephone and fax numbers including the contact person. Email and website addresses will also be included if available. Please direct all enquiries and correspondence to Sandi Saluk at (204) 988-6800 or email [ssaluk@icm.mb.ca](mailto:ssaluk@icm.mb.ca).