

# **RISK MANAGEMENT & INSURANCE PLANNING**



**Ramaq  
Chools**  
Consulting & Training

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# Contents

- 1. Introduction to Risk Management & Insurance Planning**
- 2. Why Choose Chools**
- 3. Who Can Apply?**
- 4. Program Overview**
- 5. Program Objectives and Expected Outcomes**
- 6. Skills Learned**
- 7. Program Outline**
- 8. Enrollment Information**



# Introduction to Risk Management & Insurance Planning

The Risk Management & Insurance Planning course teaches you how to identify, evaluate, and manage various types of risks that individuals and businesses face. You will learn how to use insurance and other strategies to protect your assets, income, and liabilities from potential losses. The course also covers the principles and practices of insurance, such as underwriting, pricing, regulation, and claims. This program is suitable for CPAs, financial planners, and other qualified professionals who advise clients on personal financial matters. Upon completion of the course, participants will receive a certificate of completion.





# Why Choose Chools?

## Numbers That Speak for Themselves:

- **10,000+ Successful Alumni:** Join a network of impactful professionals.
- **95% Job Placement Rate:** Secure your future with Chools' proven track record.
- **20+ Years of Excellence:** Trust in a legacy of education and industry expertise.
- **200+ Industry Partnerships:** Leverage our connections for real-world insights and opportunities.

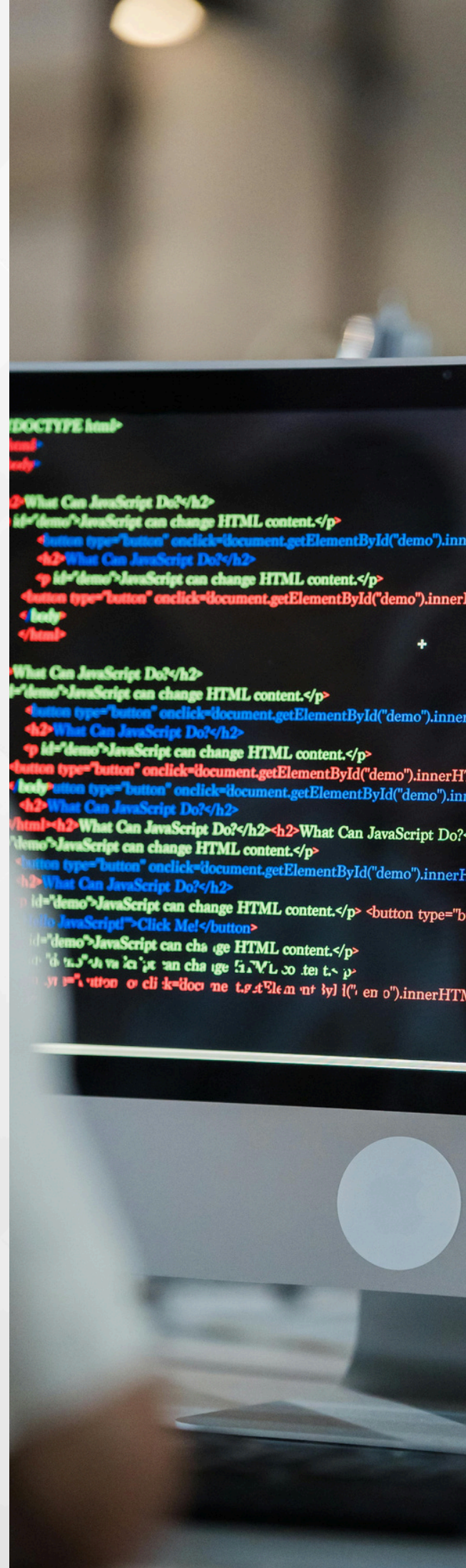
## What Sets Us Apart?

- **Expert Instructors:** Learn from industry veterans with hands-on experience.
- **Hybrid Learning Model:** Balance online flexibility with in-person engagement.
- **Comprehensive Curriculum:** Stay ahead with courses designed meet market demands.
- **Community and Networking:** Be part of an active community of learners and professionals.

## Who Can Apply?

### Eligibility Criteria:

- There are no specific eligibility requirements for this course.
- It is recommended that candidates have some basic knowledge of finance and accounting.







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- The program is suitable for CPAs, financial planners, and other qualified professionals who advise clients on personal financial matters.

## Program Overview

**The Risk Management & Insurance Planning Program provides a comprehensive education in identifying, evaluating, and managing risks through insurance and other strategies. Our curriculum covers a wide range of topics to ensure a thorough understanding, combining theoretical knowledge with practical, hands-on experience.**

### Learning Mode:

- **Hybrid Learning Model:** Combines asynchronous modules with live synchronous sessions for flexibility and interactive engagement.
- **Interactive Sessions:** Includes live webinars, workshops, and group discussions with expert instructors and peers.
- **Self-paced Learning:** Access course materials anytime, allowing you to learn at your own pace.

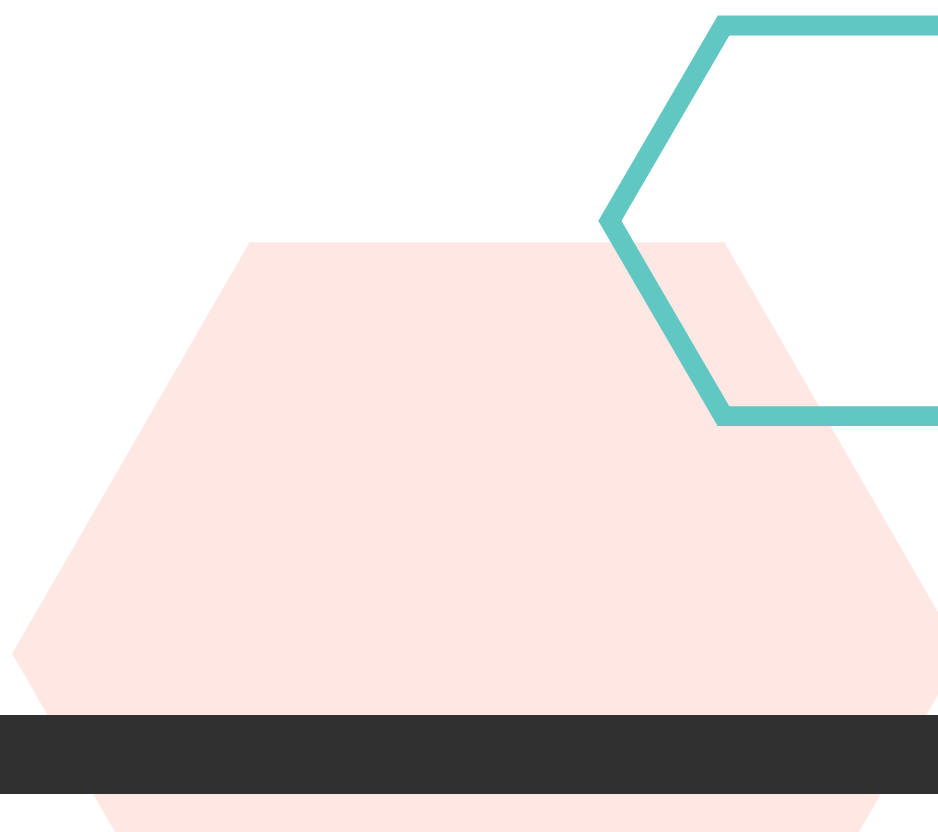




## PROGRAM OBJECTIVES

- Identify and evaluate various types of risks faced by individuals and businesses.
- Develop strategies to manage and mitigate risks using insurance and other methods.
- Understand the principles and practices of insurance, including underwriting, pricing, regulation, and claims.
- Protect assets, income, and liabilities from potential losses.
- Foster continuous learning and personal growth.
- Encourage teamwork and collaboration.
- Prepare for advanced roles in risk management and insurance planning.

## EXPECTED OUTCOMES

- Proficiency in identifying, evaluating, and managing risks.
  - Practical experience through hands-on exercises.
  - Strong analytical and problem-solving skills.
  - Application of best practices in risk management and insurance planning.
  - Innovation in understanding and managing risks.
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## SKILLS LEARNED

- **Risk Identification:** Techniques for identifying various types of risks.
- **Risk Evaluation:** Skills in evaluating the potential impact of risks.
- **Risk Management:** Developing strategies to manage and mitigate risks.
- **Insurance Principles:** Understanding the principles and practices of insurance.
- **Underwriting and Pricing:** Techniques for underwriting and pricing insurance products.
- **Regulation and Claims:** Understanding regulatory frameworks and claims processes.
- **Protection Strategies:** Applying strategies to protect assets, income, and liabilities.
- **Ethics:** Applying ethical standards and professional conduct in risk management and insurance planning.
- **Strategic Thinking:** Developing and implementing strategic risk management initiatives.
- **Decision-Making:** Making informed decisions based on risk management insights.
- **Communication Skills:** Enhancing communication and interpersonal skills.



# Program Outline

## Required Core Modules

### **Module 1: Introduction to Risk Management**

- Basics of identifying and managing various types of risks.

### **Module 2: Risk Evaluation I**

- Techniques for evaluating the potential impact of risks.

### **Module 3: Risk Evaluation II**

- Advanced risk evaluation techniques.

### **Module 4: Risk Management Strategies I**

- Basics of developing strategies to manage and mitigate risks.

### **Module 5: Risk Management Strategies II**

- Advanced risk management strategies.

### **Module 6: Insurance Principles I**

- Basics of insurance principles and practices.

### **Module 7: Insurance Principles II**

- Advanced techniques in insurance principles and practices.

### **Module 8: Underwriting and Pricing I**

- Basics of underwriting and pricing insurance products.

### **Module 9: Underwriting and Pricing II**

- Advanced underwriting and pricing techniques.

### **Module 10: Regulation and Claims I**

- Understanding regulatory frameworks and claims processes.

### **Module 11: Regulation and Claims II**

- Advanced techniques in regulation and claims management.

### **Module 12: Protection Strategies I**

- Basics of applying strategies to protect assets, income, and liabilities.

### **Module 13: Protection Strategies II**

- Advanced protection strategies.

### **Module 14: Financial Statement Analysis I**

- Introduction to analyzing financial statements.

### **Module 15: Financial Statement Analysis II**

- Advanced techniques in financial statement analysis.

### **Module 16: Risk Management Ethics**

- Understanding and applying ethical standards in risk management and insurance planning.





# Program Outline

## Enrollment Now Open!

Take the first step towards mastering risk management and insurance planning. Enroll in our **Risk Management & Insurance Planning** Program and enhance your career with Chools.