



**LOMA Class Selection for the Certified Insurance Virtual Assistant Canadian Designation Program**

Option 1:   
 \$90 - \$151 for (2) elective classes  
 \$100 processing fee

Option 2:   
 \$368 for the core educational classes  
 \$100 processing fee

Option 3:   
 \$368 for the core educational component  
 \$90 - \$151 for (2) elective classes  
 \$100 processing fee

- **All Prices subject to change and in U.S. Dollars**

**Core (All Six Required)**

(Guideline Timeframe: 0 - 2 Months - Approximately)

Development Activity	Learning Time **	Cost of Each Course in U.S. \$
Intro to Life Insurance	5.75 hours	E-learn \$120
Agency Support Functions	1 hour	E-learn \$45
Overview of Life Insurance Products	2 hours	E-learn \$45
Life Insurance Policy Comparisons and Underwriting	3 hours	E-learn \$68
Managerial Business Ethics (2 lessons)	2 ½ hours	E-learn \$45
Interacting Effectively with Agents	1 hour	E-learn \$45

**Recommended Electives (Choose Two)**

(Guideline Timeframe: 0 - 2 Months Approximately)

Development Activity	Learning Time	Cost of Each Course in U.S. \$
Reinsurance Overview	1 hour	E-learn \$45 <input type="checkbox"/>
Financial Services Overview	1 hour	E-learn \$45 <input type="checkbox"/>
Exceptional Customer Service	1 hour	E-learn \$45 <input type="checkbox"/>
Enhancing Your Listening Skills	3 hours	E-learn \$75 <input type="checkbox"/>
Overview of Individual Disability Income Insurance	1 hour	E-learn \$45 <input type="checkbox"/>
How Group Insurance Works	1 hour	E-learn \$45 <input type="checkbox"/>
Property and Casualty Concepts	3 hours	E-learn \$76 <input type="checkbox"/>
How Insurance Companies Pay Life Claims	1 hour	E-learn \$45 <input type="checkbox"/>
Communication Etiquette (2 lessons)	2 ½ hours	E-learn \$45 <input type="checkbox"/>

**\*\*Approximation of time**

Feel Free to review the LOMA Catalogue at [www.loma.org](http://www.loma.org) for any further designations or courses which may be of interest!

**Total: \$**  
**Processing Fee: \$100.00**  
**Grand Total: \$**

**Fees are non-refundable;** therefore please make sure you review all the notes on this applications as well as the CIVA Website to ensure this is the right fit for you as a VA and your business before submitting your application.

We accept money order, personal or business cheque, and credit card payments via Pay Pal. There will be a \$30 (shown in other document fee for cheques returned for non sufficient funds. To pay by credit card or from your Pay Pal account, please visit **K&M Secretarial Services** web site at [www.kmsecretarialservices.com](http://www.kmsecretarialservices.com) and click on the **Fees and Payment** tab then go down to the bottom page and click on **Make Payment**.

**Cheque or Money Order - Mail Payment To:**

Bernadette M. Wong  
**K&M Secretarial Services ~ the virtual way**  
5704, 4<sup>th</sup> Line, RR#2,  
Tottenham, Ontario  
L0G 1W0

**Disclaimer and Signature**

***K&M Secretarial Services ~ the virtual way and/or any party in affiliation with the CIVA Designation Program are in no way liable or responsible for how each applicant conducts their business or represents themselves in business prior, during or after receiving the CIVA designation.***

***K&M Secretarial Services ~ the virtual way, takes Privacy and Confidentiality to the highest level, please click on pdf file***



to see our attached Privacy Statement. By signing this application you are also agreeing to the terms and policies on our Privacy Statement provided In the above PDF.

*I understand that this designation does not allow me the right to sell or provide advice about any form of insurance/financial services to any individual and/or group of individuals.*

*I understand this certification is strictly for educational purposes only to provide me with a general overview of the insurance/financial services industry in order to administratively assist the agent/financial advisor in a more efficient and professional manner.*

*I understand this certification is not certifying me as a virtual assistant but certifying me in a niche market.*

*I understand that marketing my business and achieving clients is totally left up to my responsibility. **K&M Secretarial Services ~ the virtual way** and/or any other affiliation with the CIVA Designation Program are in no way responsible for acquiring clients or guaranteeing clients or for providing any form of marketing.*

*I certify that my answers on this application are true and complete to the best of my knowledge.*

*If this application leads to achieving my Certified Insurance Virtual Assistant designation, I understand that any false or misleading information in my application or misrepresentation as a VA holding the CIVA designation could cause disciplinary measures and/or result in the removal of my certification and all its privileges.*

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

