



UNDERWRITING TRAINING & E-LEARNING

— Success Stories —



UNDERWRITING TRAINING & E-LEARNING SUCCESS STORIES



Jeff Schafer

**Underwriting Consultant, Life and Health Benefits,
New Business Underwriting,**
Co-operators Life Insurance Company

Designations Prior to Underwriting Program: None

Designations After Underwriting Program: Fellow, Life Management Institute Program (FLMI), Fellow of the Academy of Life Underwriting (FALU)

About: As an underwriting consultant, Jeff underwrites life, health & disability products and takes a primary role in speaking with advisors firsthand. With a background in Kinesiology, medical and the human anatomy, Jeff was a natural fit for life underwriting.



QUESTIONNAIRE

Let's learn a bit about our Alumni!

1. What did you study in post-secondary school?

Jeff:

I attended the University of Regina and obtained my Bachelor's Degree in Kinesiology with a focus on medical and anatomy.

2. What types of skills does an underwriter require to succeed?

Jeff:

- Flexibility
- Able to work independently
- Accountability

3. As an underwriter, what would you say is the biggest challenge in terms of advancing in this profession?

Jeff:

I would say that continuing education and staying current in medical trends, as well as current developments are key in terms of advancing in life underwriting. In doing so, underwriters will be better equipped to have a full understanding of the cases they're dealing with.

4. How much does continuing education play in advancing an underwriter's role?

Jeff:

"It's Huge!" The process of getting my FLMI allowed me to understand the big picture, and how it all ties into Underwriting.

5. Share with us what your experience was like while in our Underwriting Training Program.

Jeff:

At times, the program felt even more intense than when I was in university. Our underwriting training presented the material to us on a very technical level, and I liked having someone to break-down how it related to underwriting. Being fresh out of University at the time, there were a lot of new concepts for me to learn, but I really enjoyed the experience.

6. What was your experience with the Underwriting Case Studies in particular?

Jeff:

I loved getting to hear stories from actual underwriters, real stories, and real case scenarios. The case studies painted a clear picture of what the real world is going to look like for us as future underwriters. It was very thorough in explaining "This is how you're going to apply your learning and this is how the real world is going to look like for you as an underwriter."

SKILLS OF A SUCCESSFUL UNDERWRITER:



Problem solving



Attention to Detail



Communication

7. How do you feel the program has contributed to your success within your career?

Jeff:

The word “instrumental” is absolutely correct. The LOGiQ³ Underwriting Training program laid the foundation for what my job as a Life Underwriter was going to be. We collectively went through the learning curve and got me working on Attending Physician’s Statements (APS).

It absolutely gave me the base that was required for life underwriting. What’s more, the content in the ALU books was directly covered in our LOGiQ³ training courses. The program’s content was very in depth and it was directly usable on the job.

8. How would you say the material covered in the program has/had an impact on your day-to-day work?

Jeff:

Having had conversations with underwriting professionals on different cases and scenarios helped with real life examples of complex cases and applying our knowledge to properly underwrite cases.

9. With the course material made available to you post-graduation, how often would you reference it?

Jeff:

The course material was valuable to have to reference back to, and cross reference with underwriting manuals. When things got off the rails, the course material allowed you to whittle down to the plain language description of what the risk is and why that may be a risk.

10. What were the main takeaways from your personal learning experience while in the program?

Jeff

When I joined the program, the first thing I noticed was the correlation to my studies and how well it fit. This made me realize how much of a good fit it would actually be and how that would lead to a great career for me.



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11. When you enrolled in the learning program, your experience was in-class. How would your learning experience be enhanced if the course content was available to you in an online e-learning format? Would you find online learning conducive to meeting your professional and personal responsibilities?

Jeff:

If you were learning online and there was a topic you found difficult, you could take your time to go over it, and review at your own time. And vice-versa, if there's a topic you're stronger in, you can just breeze through it.

12. What advice would you provide to an individual that is looking to pursue a career in Underwriting?

Jeff:

This profession is great for people who are comfortable working independently but also able to excel in a team environment. It's really validating to feel like you're helping people with their interests and insuring the risks.



Want to be a part of our Alumni Success Stories? Jump start your underwriting training and development with our program today, or start with our **free trial!**



Get started with your underwriting
training & development now!

LOGIQ³
FREEDOM TO THINK

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