

Associate, Life Management Institute (ALMI)

Required courses				
Level I		ALMI		
Insurance Principles	Insurance Operations	Insurance Administration	Business & Financial Concepts	Marketing
LOMA 280 or LOMA 281	LOMA 290 or LOMA 291	LOMA 301	LOMA 307	LOMA 320

Level I: LOMA awards a personalized certificate to learners upon successful completion of LOMA 280/281 and LOMA 290/291.

Learners must complete **ALL** required courses to earn the ALMI designation.

Fellow, Life Management Institute (FLMI)

Required courses									
Level I		ALMI			FLMI				
Insurance Principles	Insurance Operations	Insurance Administration	Business & Financial Concepts*	Marketing	Law*	Management*	Investments*	Accounting	Risk Management & Product Design
LOMA 280 or LOMA 281	LOMA 290 or LOMA 291	LOMA 301	LOMA 307	LOMA 320	LOMA 311	LOMA 335 351	LOMA 356 or LOMA 357	LOMA 361	LOMA 371

Level I: LOMA awards a personalized certificate to learners upon successful completion of LOMA 280/281 and LOMA 290/291.

Learners must complete **ALL** required courses to earn the FLMI designation.

* Learners who have credit for the discontinued courses shown below automatically receive FLMI credit for the applicable course category shown below.

Discontinued Course	Course Category
LOMA 351	Business & Financial Concepts
LOMA 310 and LOMA 315	Law
LOMA 316	Law
LOMA 330	Management
LOMA 340	Investments

Learners may be eligible for credit for other discontinued courses. Check your designation progress at www.lomanet.org.

LOMA

Insurance and Financial Services Education

NAZARIO MACALINTAL JR. FLMI

LOMA COURSE LIST

Course	Program Name	Grade	Exam Date
LOMA 289	Principles of Insurance	P	05-06-2002
LOMA 286	Principles of Financial Services and Products	P	12-27-2013
LOMA 290	Insurance Company Operations	P	11-05-2002
LOMA 301	Insurance Administration	P	05-14-2003
LOMA 310	Legal Aspects of Life and Health Insurance (U.S.)	DN	11-08-2003
LOMA 310	Legal Aspects of Life and Health Insurance (U.S.)	DN	05-13-2004
LOMA 311	Business Law for Financial Services Professionals	P	11-04-2004
LOMA 320	Insurance Marketing	DN	05-13-2005
LOMA 320	Insurance Marketing	P	11-11-2005
LOMA 330	Management Principles and Practices	P	05-08-2006
LOMA 351	Financial Services Environment	DN	11-08-2006
LOMA 351	Financial Services Environment	P	05-16-2007
LOMA 356	Investment Principles and Institutional Investing	DN	11-05-2007
LOMA 356	Investment Principles and Institutional Investing	DN	05-13-2008
LOMA 356	Investment Principles and Institutional Investing	DN	11-04-2008
LOMA 356	Investment Principles and Institutional Investing	DN	05-12-2009
LOMA 356	Investment Principles and Institutional Investing	P	11-03-2009
LOMA 361	Accounting and Financial Reporting in Life Insurance Companies	DN	05-30-2012
LOMA 361	Accounting and Financial Reporting in Life Insurance Companies	P	12-28-2012
LOMA 371	Risk Management and Product Design for Insurance Companies	DN	05-13-2011
LOMA 371	Risk Management and Product Design for Insurance Companies	P	11-11-2011

Please Note: To view details on a given course, click on the appropriate course name in the table above.

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Insurance and Financial Services Education

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Course Name: Principles of Insurance

Course ID: LOMA 280	Performance Report	Grade Report
Education Provider: LOMA		Letter Grade: P
Exam Date: 05-06-2002		Final Score: 87
Exam Language: English		Exam Type: Paper
Exam Location: 2119		Enrollment: Enrolled by EdRep: \$65.00 billed to EdRep
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Course Name: Principles of Financial Services and Products

Course ID: LOMA 286	Performance Report	Grade Report
Education Provider: LOMA		Letter Grade: P
Exam Date: 12-27-2013		Final Score: 77
Exam Language: English		Exam Type: I*STAR (Internet)
Exam Location: 2119		Enrollment: Enrolled by EdRep: \$100.00 billed to EdRep
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Course Name: Insurance Company Operations

Course ID: LOMA 290	Performance Report	Grade Report
Education Provider: LOMA		Letter Grade: P
Exam Date: 11-05-2002		Final Score: 99
Exam Language: English		Exam Type: Paper
Exam Location: 2119		Enrollment: Enrolled by EdRep: \$65.00 billed to EdRep
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Insurance and Financial Services Education

NAZARIO MACALINTAL JR. FLMI

Course ID: LOMA 330	<input type="button" value="Performance Report"/>	<input type="button" value="Grade Report"/>	
Education Provider: LOMA			Letter Grade: P
Exam Date: 05-08-2006			Final Score: 89
Exam Language: English			Exam Type: Paper
Exam Location: 2119			Enrollment: Enrolled by EdRep: \$75.00 billed to EdRep
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Course Name: Financial Services Environment

Course ID: LOMA 351	<input type="button" value="Grade Report"/>		
Education Provider: LOMA			Letter Grade: DN
Exam Date: 11-08-2006			Final Score:
Exam Language: English			Exam Type: Paper
Exam Location: 2119			Enrollment: Enrolled by EdRep: \$75.00 billed to EdRep
Fee Transfer Purchased	Expiration Date: 06-08-2007		Fee Transfer: \$30.00 billed to EdRep
Used: 02-14-2007	By LOMA 351		
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Course Name: Financial Services Environment

Course ID: LOMA 351	<input type="button" value="Performance Report"/>	<input type="button" value="Grade Report"/>	
Education Provider: LOMA			Letter Grade: P
Exam Date: 05-16-2007			Final Score: 73
Exam Language: English			Exam Type: Paper
Exam Location: 2119			Enrollment: Enrolled by EdRep: \$0.00
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LOMA

Insurance and Financial Services Education

NAZARIO MACALINTAL JR. FLMI

Course ID: LOMA 301 **Performance Report** **Grade Report**

Education Provider: LOMA

Exam Date: 05-14-2003

Exam Language: English

Exam Location: 2119

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Letter Grade: P

Final Score: 89

Exam Type: Paper

Enrollment: Enrolled by EdRep: \$65.00 billed to EdRep

Course Name: Legal Aspects of Life and Health Insurance (U.S.)

Course ID: LOMA 310 **Grade Report**

Education Provider: LOMA

Exam Date: 11-06-2003

Exam Language: English

Exam Location: 2119

Fee Transfer Purchased Expiration Date: 06-06-2004

Used: 02-19-2004 By LOMA 310

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Letter Grade: DN

Final Score:

Exam Type: Paper

Enrollment: Enrolled by EdRep: \$65.00 billed to EdRep

Fee Transfer: \$35.00 billed to EdRep

Course Name: Legal Aspects of Life and Health Insurance (U.S.)

Course ID: LOMA 310 **Purchase Transfer** **Grade Report**

Education Provider: LOMA

Exam Date: 05-13-2004

Exam Language: English

Exam Location: 2119

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Letter Grade: DN

Final Score:

Exam Type: Paper

Enrollment: Enrolled by EdRep: \$0.00

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Insurance and Financial Services Education

NAZARIO MACALINTAL JR. FLMI

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Course Name: Investment Principles and Institutional Investing

Course ID: LOMA 356	Grade Report	Letter Grade: DN
Education Provider: LOMA		Final Score:
Exam Date: 11-06-2007		Exam Type: Paper
Exam Language: English		Enrollment: Enrolled by EdRep: \$80.00 billed to EdRep
Exam Location: 2119		Fee Transfer: \$30.00 billed to EdRep
Fee Transfer Purchased	Expiration Date: 06-06-2008	
Used: 01-09-2008	By LOMA 356	

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Course Name: Investment Principles and Institutional Investing

Course ID: LOMA 356	Grade Report	Letter Grade: DN
Education Provider: LOMA		Final Score:
Exam Date: 05-13-2008		Exam Type: Paper
Exam Language: English		Enrollment: Enrolled by EdRep: \$0.00
Exam Location: 2119		Fee Transfer: \$30.00 billed to EdRep
Fee Transfer Purchased	Expiration Date: 12-13-2008	
Used: 08-04-2008	By LOMA 356	

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Course Name: Investment Principles and Institutional Investing

Course ID: LOMA 356	Grade Report	Letter Grade: DN
Education Provider: LOMA		

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Insurance and Financial Services Education

NAZARIO MACALINTAL JR. FLMI

Course ID: LOMA 311	Performance Report	Grade Report
Education Provider: LOMA		Letter Grade: P
Exam Date: 11-04-2004		Final Score: 100
Exam Language: English		Exam Type: Paper
Exam Location: 2119		Enrollment: Enrolled by EdRep: \$68.00 billed to EdRep
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Course Name: Insurance Marketing

Course ID: LOMA 320	Grade Report	
Education Provider: LOMA		Letter Grade: DN
Exam Date: 05-13-2005		Final Score:
Exam Language: English		Exam Type: Paper
Exam Location: 2119		Enrollment: Enrolled by EdRep: \$72.00 billed to EdRep
Fee Transfer Purchased	Expiration Date: 12-13-2005	Fee Transfer: \$35.00 billed to EdRep
Used: 08-11-2005	By LOMA 320	
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Course Name: Insurance Marketing

Course ID: LOMA 320	Performance Report	Grade Report
Education Provider: LOMA		Letter Grade: P
Exam Date: 11-11-2005		Final Score: 92
Exam Language: English		Exam Type: Paper
Exam Location: 2119		Enrollment: Enrolled by EdRep: \$0.00

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Insurance and Financial Services Education

NAZARIO MACALINTAL JR. FLMI

Course ID: LOMA 361 **Grade Report**
Education Provider: LOMA
Exam Date: 06-30-2012
Exam Language: English
Exam Location: 2119
Fee Transfer Purchased Expiration Date: 01-25-2013
Used: 07-05-2012 By LOMA 361

Letter Grade: DN
Final Score:
Exam Type: I*STAR (Internet)
Enrollment: Enrolled by EdRep: \$155.00 billed to EdRep
Fee Transfer: \$50.00 billed to EdRep

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Course Name: Accounting and Financial Reporting in Life Insurance

Course ID: LOMA 361 **Performance Report** **Grade Report**
Education Provider: LOMA
Exam Date: 12-28-2012
Exam Language: English
Exam Location: 2119

Letter Grade: P
Final Score: 77
Exam Type: I*STAR (Internet)
Enrollment: Enrolled by EdRep: \$0.00

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Course Name: Risk Management and Product Design for Insurance

Course ID: LOMA 371 **Grade Report**
Education Provider: LOMA
Exam Date: 05-13-2011
Exam Language: English
Exam Location: 2119

Letter Grade: DN
Final Score:
Exam Type: Paper
Enrollment: Enrolled by EdRep: \$112.00 billed to EdRep

Professional Designation Programs

FFSI and AFSI Designations

LOMA's Fellow, Financial Services Institute (FFSI) is a 10-credit designation program that provides broad contextual information through seven core courses and customized, job-specific learning through the FFSI's unique Professional Achievement Credits (PACs).

The FFSI's seven "core" courses and three PACs provide a comprehensive study of the legal, economic, and business environment of financial services organizations and marketing of financial products to individuals and organizations.

The requirement of three PACs provides the opportunity to customize the FFSI program for students' needs. PACs are credits granted by LOMA for demonstrated professional

achievement in such financial services product areas as annuities, mutual funds/brokerages, retirement plans, and banking. Students earn PACs by passing courses, obtaining licenses, or earning designations offered by LOMA and other organizations around the world.

LOMA's Associate, Financial Services Institute (AFSI) five-course designation provides recognition for a student's achievement in mastering the knowledge to reach the halfway point of the FFSI program requirements. Although students can take courses toward AFSI and FFSI designations in any order they choose, LOMA recommends a course progression that begins with Level I.

Associate, Financial Services Institute (AFSI)

Required courses			Elective courses — select two			
Level I		Level II				
Principles	Financial Planning	Investments	Law	Marketing	Management ¹	Employee Benefits
LOMA 286	LOMA 305	LOMA 356 or LOMA 357	LOMA 311	LOMA 326	LOMA 335	LOMA 380
<p><i>done</i></p> <p>Level I: LOMA awards a personalized certificate to learners upon successful completion of LOMA 286 and LOMA 305.</p>		<p><i>done</i></p>	<p><i>done</i></p>		<p><i>351</i></p> <p><i>done</i></p>	
Students must complete THREE required courses and TWO electives to earn the AFSI designation.						

Fellow, Financial Services Institute (FFSI)

Required courses							
Level I		Level II					
Principles	Financial Planning	Law	Marketing	Management ¹	Investments	Employee Benefits	Professional Achievement Credits
LOMA 286	LOMA 305	LOMA 311	LOMA 326	LOMA 335	LOMA 356 or LOMA 357	LOMA 380	Three Professional Achievement Credits (PACs). For more information on PACs, visit www.loma.org .
<p>Level I: LOMA awards a personalized certificate to learners upon successful completion of LOMA 286 and LOMA 305.</p>							
Learners must complete ONE course from each column shown and earn THREE PACs to earn the FFSI designation.							

¹ Learners who earned credit for LOMA 351 automatically receive credit for the AFSI or FFSI Management course.