



### **CPE Accreditation**

**Program Level:** Intermediate – this program builds on basic skills in order to relate fundamental principles and skills to practical situations, and to extend them to a broader range of applications. This level is for participants with exposure to the subjects.

**Learning Objectives:** Upon completion, participants will better understand the following:

- How private placements are changing due to regulatory environment, ratings (or not) and structure; as well as perspectives on sizing alternative investment portfolios.
- Impact investing and implementation strategies, including how some insurers have incorporated impact into portfolio construction and how they conduct ongoing reporting/monitoring against impact objectives.
- Updates and insights as the National Association of Insurance Commissioners (NAIC) appears ready to make a final call to approve new risk-based capital (RBC) factors for bond investments and updating RBC factors for real estate investments.
- Insights from industry M&A leaders on key trends, the main drivers of deals and what the industry can expect next.

**Field of Study:** Management Services

**Program Prerequisites/Advance Preparation:** Basic knowledge of the finance and investment issues associated with the life insurance industry is required.

**Instructional Method:** All presentations are group-live with instructor in room with participants. Recommended CPE credits 4 hours. \*Sponsored activities are measured by program length, with one 50-minute period equal to one CPE credit. One-half CPE credit increments (equal to 25 minutes) are permitted after the first credit has been earned in a given learning activity.

**Acquiring Your CPE Credits:** For each CPE session, (Finance/Investment track) 3 live polls will pop up on your screen throughout the duration of the given session. Please complete each poll in order to verify your attendance and participation. Credit **WILL NOT** be given if you do not complete the poll(s). Please email Mackenzie Curtin at [MackenzieCurtin@acli.com](mailto:MackenzieCurtin@acli.com) for any questions regarding CPE.

**CLE Accreditation:** ACLI is accredited in **MOST** mandatory continuing legal education states. Some states are on a delayed approval process due to slowed workstreams from the work from home environment. Some states have not granted this Conference accreditation. Please email Mackenzie Curtin at [MackenzieCurtin@acli.com](mailto:MackenzieCurtin@acli.com) for any questions regarding CLE.

**Acquiring Your CLE Credits** - In each CLE session, (Compliance/Legal track) there will be 3 live poll prompts that will appear throughout the duration of the given session. Please complete each poll in order to verify your attendance and participation. Credit **WILL NOT** be given if you do not complete the poll(s). Please email Mackenzie Curtin at [MackenzieCurtin@acli.com](mailto:MackenzieCurtin@acli.com) for any questions regarding CLE.

Below, please find a list of states that have been approved/denied or are still pending approval status.

CLE STATES:

Below you will find a list of the states with which the ACLI has filed an application for CLE credit. However, since each state has different CLE requirements and calculates we strongly recommend that you contact your state CLE board with any questions.

	<u>Credit Hours</u>			<u>Credit Hours</u>	
	Total Credits	Ethics		Total Credits	Ethics
*AL		0	NE	4	0
AR	4	0	*NH		
*AZ		0	*NJ		0
CA	4	0	*NM		0
CO	4	0	NV	4	0
DE	4	0	*NY		0
FL	5	0	OH	4	0
GA	4	0	OK	4	0
*IA		0	OR	4	0
			**PA	0	0
ID	1	0	*RI		0
*IL		0	*SC		0
IN	3	0	**TN	0	0
KS	3.5	0	*TX		0
KY	4	0	*UT		0
LA	4	0	*VA		0
MN	7	0	VT	4	0
MO	4	0	*WA		0
MS	4	0	WI	4	0
NC	4	0	*WV		0
ND	4	0			

\* At this time, responses from these states had not been received. Credit hours shown reflect number of credit hours approved. We recommend you follow up with your state bar to verify the number of approved credit hours. As of October 11, 2021

\*\*At this time, the course for accreditation was denied and no credit will be given for that state.