

**WELCOME!**



**Your Tool in Recruiting the  
Next Generation of Talent**

**[www.investprogram.org](http://www.investprogram.org)**



## Our Mission

**Invest** educates individuals on insurance, financial literacy and risk management, while encouraging the pursuit of insurance careers with a focus on independent agencies.

# What is Invest

- Insurance education program providing most young people with their FIRST introduction to insurance
- Taught in high schools, community colleges and workforce development programs
- Gives students real-life exposure to insurance professionals and potential insurance careers.



**Why  
Invest?**

**We NEED TALENT**

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# We need talent

One million of the 2.3 million insurance industry workers will retire within the next 8 years.

25% will be within 5-8 years of retirement in the next 5 years.

60% are over the age of 45 and looking to retire within the next 15 years.

75% will be a millennial by 2025.

The situation is dire for insurance agencies who say their #1 challenge to business growth is lack of staff.



# What makes our industry appealing...

- **Variety** — Every day can presents new opportunities and challenges.
- **Advancement** — Endless potential for growth.
- **Stability** — Multi-billion-dollar industry with a long history of growth.
- **Flexibility** — Great work / life balance.
- **Personal Growth & Satisfaction** —You can succeed professionally while making an impact in your community.



# Invest continues to grow across the country



**900+** Programs Nationwide



**33%** Programs Represent Underserved Diverse Student Populations



**33,000+** Students



# How Invest Supports Classrooms



**Assistance from Invest Staff and Invest Teachers**



**Online Games and Activities**



**Printed Textbooks and Online Curriculum**



**Comparative Rate Simulation to Quote Policies**



**Teacher's Guide with Resources**



**Volunteer Insurance Industry Speakers**



**Lesson Plans with Quizzes, Tests and Discussion Prompts**



**Scholarship Opportunities**



# Curriculum Overview

- Careers in Insurance**
- Agency Operations**
- Marketing & Selling Insurance**
- Managing Risks**
- Car Insurance**
- Homeowners & Renters Insurance**
- Businessowners Insurance**
- Life and Health Insurance**

# Tailored to fit a Teacher's Schedule

12 online chapters, a sample lesson plan, discussion questions, short quizzes and interactive games.

Micro modules to break down the chapters.

Volunteers help students understand concepts, business skills, résumé building, developing a LinkedIn profile and connections to internship and career opportunities.

Schools have the option to incorporate Invest into current business or finance classes or teach Invest for a semester or a year.



# Additional Ways Invest Helps

**New Agents Mentorship & Scholarship Initiative**

**Classroom to Career Scholarships**

**College Bound Scholarships**

**Internships**



# Classroom to Career Scholarships

This scholarship provides current or prior Invest students wishing to move directly into a career in insurance with up to \$500 in scholarship funds to reimburse insurance education expenses including pre-licensing fees, entry level courses, or CISR and ACSR designations



# College Bound Scholarships

This scholarship in the amount of \$5,000 to \$10,000 provides current or prior Invest students, funds to go towards their two or four-year college degree. Applicants must be pursuing a degree with an emphasis on insurance, risk management, actuarial science or business with the intent of pursuing an insurance-related career after graduation.



# New Agents Scholarship Initiative

Emerging agents that have been in the insurance industry less than 12 months are eligible for up to \$500 in reimbursement of their pre-licensing expenses along with an additional \$500 towards their first insurance designation. Scholarship funds are distributed after successful completion of 6-month group mentorship program.

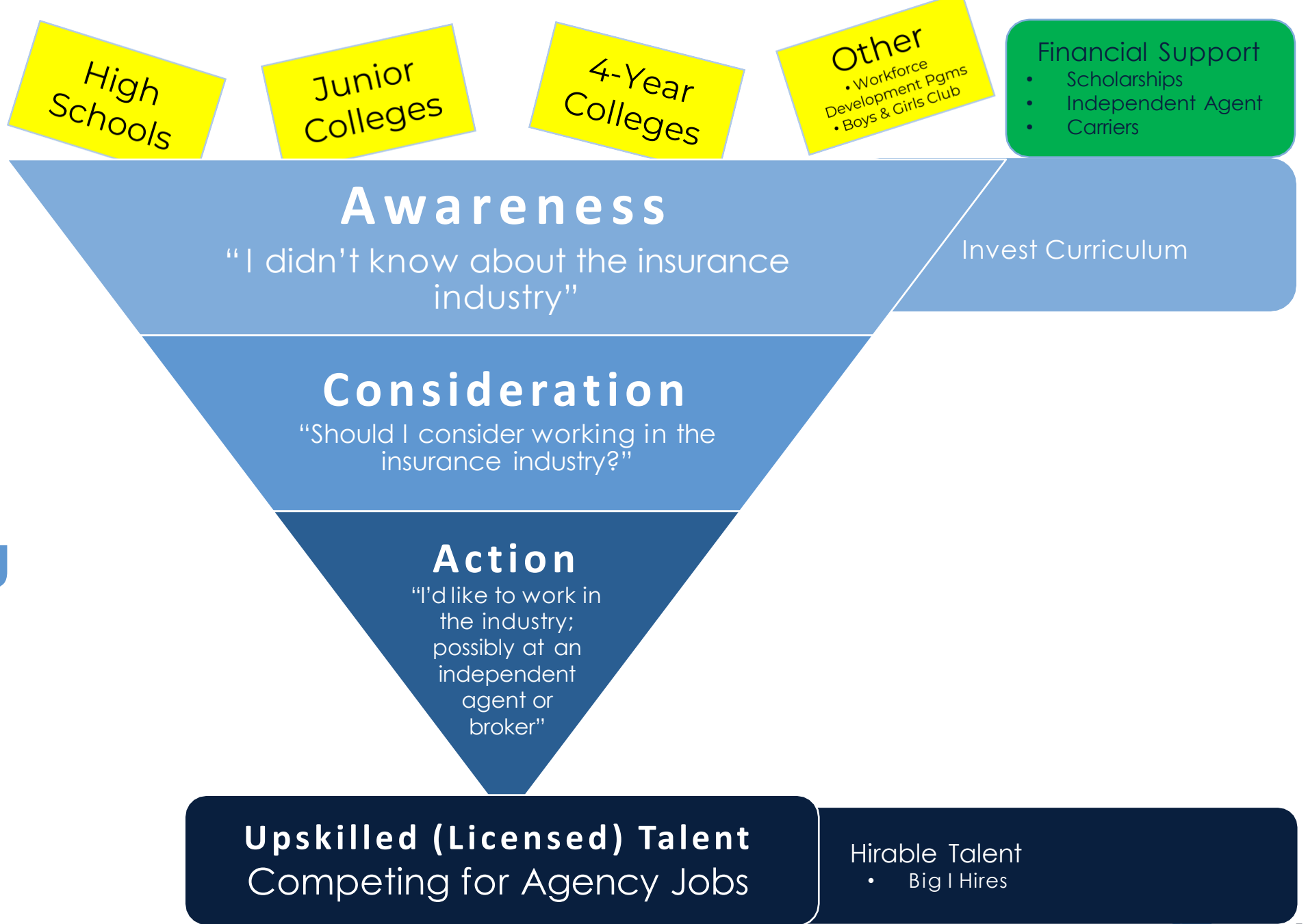


# Student Internships

This matching grant provides independent agencies up to \$3,000 to go towards funding (1) intern. To apply for this grant, the agency must hire on a minimum of two interns to participate in their internship during the same time duration. The interns' previous participation in an Invest program is strongly encouraged but not required.



# Insurance Industry Talent Marketing Funnel





# Invest awards scholarships to high-school seniors participating in our program with plans to pursue insurance careers.



100%

of the scholarship funds go directly to students



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Nearly half a million dollars awarded to students in the past 10 years



# Boys and Girls Club Pilot

[INDUSTRY CLUB SHARK TANK final.mp4 \(dropbox.com\)](#)



## Emphasis on Bringing Diverse Talent into the Industry

Attracting the best talent to our industry requires broadening our reach to include people traditionally not represented in insurance.

Focusing on **undeserved areas** – urban and rural

Adopting a **geographical diversity mindset** to expand our outreach



## 3 Ways to Support



**Get  
Involved**

**Spread  
the Word**

**Donate**

[www.investprogram.org](http://www.investprogram.org)

# Join us for a conversation

[www.investprogram.org/connect](http://www.investprogram.org/connect)

**Invest 101**

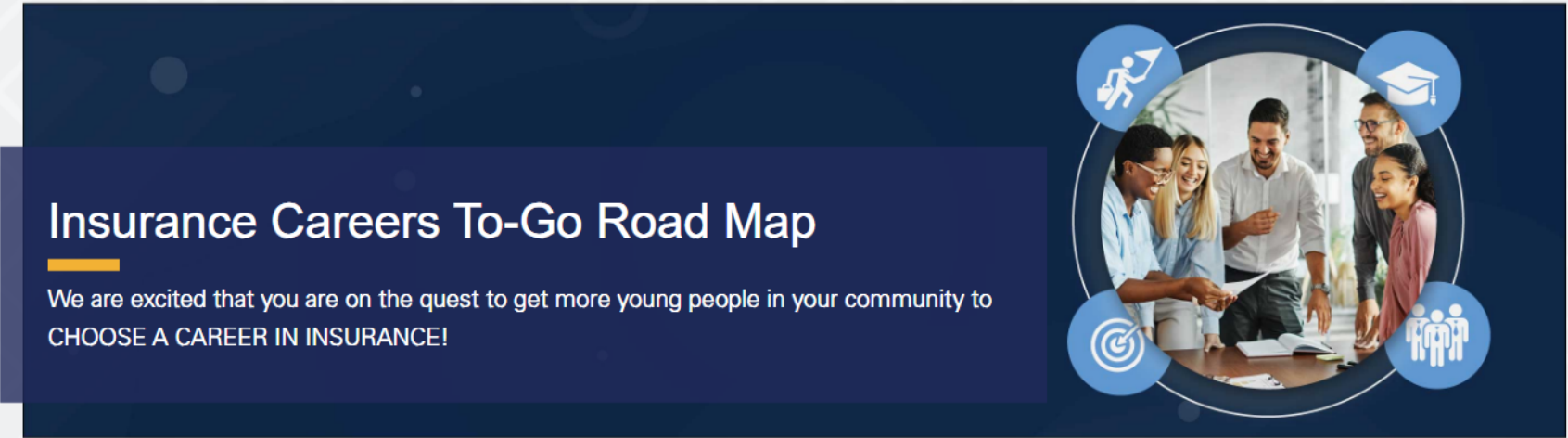
**Push Your Program  
Forward**

**Launch a New  
Program**

**Teacher Connect**



# investprogram.org/careerstogo



**Insurance Careers To-Go Road Map**

We are excited that you are on the quest to get more young people in your community to **CHOOSE A CAREER IN INSURANCE!**

The banner features a central image of a diverse group of young professionals in a meeting, surrounded by four circular icons: a person with a briefcase and arrow, a graduation cap, a target, and a group of people.

## Explore! Connect! Commit! Promote! Present!

This resource guide is organized in 5 steps designed to serve as a roadmap with the tools you may need to formally get in front of an organized group of students by way of a school or youth nonprofit program. Our number one goal at Invest is to educate individuals on insurance, financial literacy and risk management, while encouraging the pursuit of insurance careers with a focus on independent agencies. Thank you for your partnership!



Explore



Connect



Commit



Promote & Present



Invest looks forward to partnering with you to attract more talent into independent agencies!

**THANK YOU FOR YOUR SUPPORT!**

**Questions?**

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# Some of our many supporters

