



The Insurance Library

Research • Education • Engagement

Custom Education Program Intake Form

Thank you for your interest in our custom education programs. Please complete this intake form so we can prepare the proposal that best suits your needs.

Please email the completed form to Sarah Hart, our Education Coordinator, at education@insurancelibrary.org. If you have any questions please email Sarah at the same address or call her at 617-227-2087. Thank you.

1. Program Type

- Would you like to:
 - Use one of our pre-approved webinars, classes, or course outlines for CE credit?
 - Collaborate with the Library and an instructor to create a custom course or class, including, if desired, company-specific forms or other materials?

2. Delivery Method

- Do you want the instruction to be:
 - **In-person?** If so, please identify the location:
 - **Online?**
 - **Hybrid?**
 - *Note: We are not able to give CE credit to those participating in a hybrid course virtually.*

3. Duration

- How long would you like the program to be? (Select one)
 - One day
 - More than one day
 - On each day, do you prefer the sessions to be:
 - 2 hours (the typical length of most of our pre-approved webinars)
 - 4 hours (allows for custom topics or more time for questions and student interaction)
 - Full-day(s) (6-8 hours including a lunch break, which allows for multiples sessions or more than one topic)
 - Other: _____

4. Participants

- How many participants do you anticipate? _____
- Would you prefer:
 - All participants to attend the same session?
 - To divide participants into smaller groups, with the same subjects repeated across multiple sessions?

5. Continuing Education Credit

- Do you want the program to be approved for producer or adjuster continuing education credit?
 - Yes, in the following New England state(s):
 - No

6. Additional Needs

- Please list any additional requirements, goals, or concerns of which we should be aware:

7. Primary Contact:

- Name:
- Email:
- Phone:
- Mailing Address: