

# Finance for Insurance Leaders

## Product Overview

*Finance for Insurance Leaders* is a two-day, in-person program that clarifies industry-specific financial concepts and helps leaders apply them in their roles. Our dynamic instructor — an expert in insurance finance — comes to a member company's location and engages groups of 10-25 leaders in meaningful, relevant discussion.

An [open-enrollment session](#) is also available.

## Additional Resources

[Finance for Insurance Leaders Webpage](#)

## Who Should Attend?

Finance for Insurance Leaders is designed for senior leaders in non-financial business areas, leaders in operations, IT, marketing, HR, distribution, and products, and top leaders who need stronger financial acumen to achieve the next level.

## Key Features and Benefits

- Two days of engaging, instructor-led content
- Dynamic instructor — an expert in finance — explains unique aspects of financial management in the insurance industry
- Companies' CFO or SMEs can join to provide a company-specific perspective
- Competitive pricing
- Proven success in effective, engaging learning programs
- Consistently positive feedback from participants and leaders

## Competitors

While there are no direct competitors, Finance for Insurance Leaders does compete for the same corporate training dollars as other programs a company or employee may consider for training and development.

There are many "finance for non-finance managers" training programs available, but this one is unique in that it's specific to finances for a life insurance company, taught by expert instructors who have worked in the industry.

## 2025 Pricing

- **Private Company Sessions:** bring Finance for Insurance Leaders directly to an organization
  - LOMA members
    - \$29,250, up to 10 participants
    - \$2,925 per person over 10 participants, max of 25
- **Open-Enrollment Sessions:** non-financial leaders gain an understanding of the unique aspects of financial management in the life insurance industry. [Upcoming sessions.](#)
  - LOMA members
    - Early-bird: \$2,950/person
    - Registration: \$3,250/person
- Open Enrollment non-member
  - Early-bird: \$5,900/person
  - Registration: \$6,500/person

## Trends

- 25% of skillsets for jobs have changed. By 2027, this number is expected to double.<sup>1</sup>
- In the next 15 years, 50% of the current insurance workforce will retire<sup>2</sup>, while less than 25% of the industry is under the age of 35.

<sup>1</sup>LinkedIn Workplace Learning Report

<sup>2</sup>U.S. Bureau of Labor Statistics

<sup>3</sup>U.S. Chamber

## Customer Pain Points

- Increasing employees' speed to proficiency to prepare them to have an impact quickly
- Retaining top talent with investments in their future
- Ensuring non-financial leaders have the industry acumen necessary to be effective and productive in their roles

## Overcoming Objections

### Program cost

This program is priced competitively for the unique value it offers our members: technical training on a complex topic specific to our industry.

We offer volume discounts for both open enrollment and company-specific sessions. For open enrollment sessions, we offer 10% off per person for companies who register 3 or more employees. Companies that contract for 3 or more private sessions receive a 15% discount per session.

### Length of program

Finance for Insurance Leaders consists of two days of live, in-person instruction to maximize opportunities for learning and connecting. Leaders benefit from having dedicated time and space to focus on a topic that is key to their future success, as well as to the company's. The opportunity for these busy leaders to learn with minimal distractions and to have productive conversations with colleagues across the organization is an invaluable experience.

## FAQ

### Who is Finance for Insurance Leaders for?

Finance for Insurance leaders is designed for senior leaders in non-financial business areas, leaders in operations, IT, marketing, HR, distribution, and products, and top leaders who need stronger financial acumen to achieve the next level.

### How is Finance for Insurance Leaders received amongst our members?

Introduced in 2023 to nearly 100 industry leaders, this program gets rave reviews:

- 96% find educational value above average/outstanding
- 96% find opportunities for participation above average/outstanding
- 94% participants feel better equipped to succeed in their roles after completing the program
- 94% participants find the instructor above average/highly effective

### How many participants can attend a Finance for Insurance Leaders session?

Minimum pricing for Finance for Insurance Leaders welcomes up to 10 participants, with the ability to add additional participants (for an extra fee per person), up to a maximum of 25.

### Can our company make changes to the content?

Yes, you may choose to tailor the program by incorporating your company's financial statement into the curriculum, and your CFO or other SME can join to add company-specific details.