

1. TITLE OF THE CERTIFICATE (DE) (1)

**Abschlussprüfung im staatlich anerkannten Ausbildungsberuf  
Versicherungskaufmann/Versicherungskauffrau**

(1) in original language

2. TRANSLATED TITLE OF THE CERTIFICATE (EN)(1)

**Final examination in the state-recognized training occupation  
Insurance management assistant**

(1) This translation has no legal status.

3. PROFILE OF SKILLS AND COMPETENCES

- Advise and support customers and interested parties in accordance with the given situation
- Analyse individual customer requirements for insurance protection and investments
- Emphasise product benefits for the customer and make offers
- Conduct risk checks and make a decision on application acceptance
- Conclude agreements and accord due consideration to general legal conditions
- Undertake contractual amendments
- Carry out measures for management of business in force and retention of agreements
- Assess claims and determine the amount of benefits payable
- Use accountancy instruments and controlling results to inform activities
- Work as a team and in a process and project oriented manner
- Use up-to-date information and communication technology systems
- Use chairing and presentation techniques
- Plan and organise work processes in an autonomous manner

4. RANGE OF OCCUPATIONS ACCESSIBLE TO THE HOLDER OF THE CERTIFICATE (1)

Insurance management assistants are mainly employed at insurance companies or work as self-employed insurance agents or brokers. They may also work for industrial and commercial companies as well as finding employment with banks or other service institutions.

(1) if applicable

**(\*) Explanatory notes**

This document is designed to provide additional information about the specified certificate and does not have any legal status in itself. The format of the description is based on the following texts: Council Resolution 93/C 49/01 of 3 December 1992 on the transparency of qualifications, Council Resolution 96/C 224/04 of 15 July 1996 on the transparency of vocational training certificates, and Recommendation 2001/613/EC of the European Parliament and of the Council of 10 July 2001 on mobility within the Community for students, persons undergoing training, volunteers, teachers and trainers.

More information on transparency is available at: [www.europass.cedefop.eu.int/transparency](http://www.europass.cedefop.eu.int/transparency)

## 5. OFFICIAL BASIS OF THE CERTIFICATE

<b>Name and status of the body awarding the certificate</b> Chamber of Industry and Commerce	<b>Name and status of the national/regional authority providing accreditation/recognition of the certificate</b> Chamber of Industry and Commerce
<b>Level of the certificate (national or international)</b> ISCED 3B	<b>Grading scale / Pass requirements</b> 100-92 points = 1 = excellent 91 - 81 points = 2 = good 80 - 67 points = 3 = average 66 - 50 points = 4 = pass 49 - 30 points = 5 = poor 29 - 0 points = 6 = fail  A total of at least 50 grade points are required to pass the examination.
<b>Access to next level of education / training</b>  Bachelor of Insurance Management, specialist commercial clerk for company pension provision, banking economist, business economist (public administration), certified senior financial consulting clerk, certified senior clerk for insurance and finances, certified senior leasing clerk, business economist for insurance (German Insurance Academy)	<b>International agreements</b>  In the field of vocational training, joint declarations on the comparability of qualifications obtained in the respective vocational training systems have been signed on the basis of bilateral agreements concluded between Germany and France and between Germany and Austria.
<b>Legal basis</b> Ordinance on Initial Vocational Education and Training in the Occupation of Insurance management assistant of 07/22/2002 (Federal Law Gazette, Part I, p 2795) Resolution of the Standing Conference of the Ministers of Education and Cultural Affairs of the Länder in the Federal Republic of Germany, KMK, of 14.05.2002), (Federal Gazette, No 212a of 14.11.2002)	

## 6. OFFICIALLY RECOGNISED WAYS OF ACQUIRING THE CERTIFICATE

Final examination administered by the competent body: <ol style="list-style-type: none"> <li>1. after completion of dual training in a company and at part-time vocational school (normal procedure)</li> <li>2. after retraining in a recognized training occupation</li> <li>3. as an external examination for working people without formal vocational qualifications or persons who have been trained at full-time vocational schools or other vocational training institutions</li> </ol>
<b>Additional information</b>  <b>Entry requirements:</b> Entry requirements are not governed by legislation; as a rule, young people are admitted after completing (nine or ten years of) general education. <b>Duration of training:</b> 3 years. <b>Training in the "dual system":</b> Teaching of the knowledge, skills and competences needed for an occupation is based on the typical requirements of work and business processes and prepares the trainees for a specific job. <b>The training is provided in a company and at part-time vocational school:</b> In the company, the trainees acquire practical skills in a real working environment. On one or two days per week, the trainees attend part-time vocational school, where they are taught general and vocational knowledge related to their training occupation.  <b>More information</b> is available at: <a href="http://www.berufenet.arbeitsagentur.de">www.berufenet.arbeitsagentur.de</a>  <b>National Europass Centre</b> <a href="http://www.europass-info.de">www.europass-info.de</a>