

1. TITLE OF THE CERTIFICATE (DE)

**Zeugnis über die Prüfung zum anerkannten Fortbildungsberuf
Geprüfter Fachwirt/Geprüfte Fachwirtin für Versicherungen und Finanzen**

2. TRANSLATED TITLE OF THE CERTIFICATE (EN)

**Certificate on completion of the recognized further training examination for
Certified insurance and finance specialist**

This translation has no legal status.

3. PROFILE OF SKILLS AND COMPETENCES

- Analyse and assess corporate processes on the basis of business management, economic and legal conditions and draw conclusions with regard to justifiable steps
- Conduct risk analyses, assess demand and develop customer-oriented problem-solving strategies for tackling private and commercial risks
- Perform managerial and training tasks and design and organize projects, making systematic and targeted use of managerial principles and communication techniques
- Trigger the development of innovative products and cooperate in product development projects
- Perform qualified work in one of the selected core areas of sales management, risk management or claims management.

4. RANGE OF OCCUPATIONS ACCESSIBLE TO THE HOLDER OF THE CERTIFICATE

Certified insurance and finance specialists are managers in insurance and financial services companies, where they work in different functional areas and operations, or they work in a self-employed capacity. They are responsible for solving complex planning, managerial, organizational and supervisory tasks independently, using instruments of operations control and human resources management and providing relevant instruction for staff.

(*) 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.cedefop.eu.int/transparency

5. OFFICIAL BASIS OF THE CERTIFICATE

<p>Name and status of the body awarding the certificate Chamber of Industry and Commerce (<i>Industrie- und Handelskammer, IHK</i>)</p>	<p>Name and status of the national/regional authority providing accreditation/recognition of the certificate Chamber of Industry and Commerce</p>
<p>Level of the certificate (national or international) ISCED 2011 Level 65 These qualifications are referenced to level 6 of both the German and the European Qualifications Framework (DQR, EQF); see publication of 1 August 2013 (BAnz AT 20.11.2013 B2).</p>	<p>Grading scale/Pass requirements (**) 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 The candidate passed all examinations required for the completion of further training.</p>
<p>Access to next level of education and training The further training examination gives access to the next level of qualifications</p> <ul style="list-style-type: none"> • Certified business economist under the Vocational Training Act (<i>Geprüfter Betriebswirt/Geprüfte Betriebswirtin, BBiG</i>) • Certified business economist under the Crafts Code (<i>Geprüfter Betriebswirt/Geprüfte Betriebswirtin, HwO</i>) • Certified vocational training specialist (<i>Geprüfter Berufspädagoge/Geprüfte Berufspädagogin</i>) <p>as well as access to advanced programmes in higher education.</p>	<p>International agreements</p>
<p>Legal basis Regulations governing the recognized further training examination for certified insurance and finance specialist of 26 August 2008 (BGBl. I p. 1758); last amended by the regulations of 26 March 2014 (BGBl. I p. 274)</p>	

6. OFFICIALLY RECOGNIZED WAYS OF ACQUIRING THE CERTIFICATE

<p>The certificate is acquired through passing the examination administered by the body mentioned in section 5 above. Before sitting the examination, candidates must furnish proof of</p> <ol style="list-style-type: none"> 1. Successful completion of training in a recognized occupation in the insurance sector, followed by at least one year of relevant practical work or 2. Successful completion of training in another recognized commercial or administrative occupation, followed by at least two years of relevant practical work or 3. At least four years of relevant practical work or 4. Relevant skills and competences.
<p>Additional information The skills and competences of which proof is to be furnished in the further training examination are usually acquired during many years of practical work and within the framework of education measures. Courses are offered in preparation for the examination; their duration and content are geared to the different specialist and managerial tasks. Translations of the certificate can be obtained from the body mentioned in section 5 above.</p>

() Note**

Simplified grading scale; for official grading scale see Sixth Ordinance Amending Further Training Examination Regulations of 9 December 2019 (Federal Law Gazette Part I, p. 2153)