



Upper Iowa University
and
LOMA Education Programs

Academic credit recommendations as indicated by the National College Credit Recommendation Service (CCRS)

Course-to-Course Articulation
August 2019

Degree Category Key – Suggested Level		UIU Course Key
LD	Lower-Division Baccalaureate / Associate Degree	# Credit for only one of LOMA (310), 311, (315), 316 or 321
UD	Upper-Division Baccalaureate	## Credit for only one of LOMA 320, 321 or 326
LD/UD	Refer to UIU course column for transfer level	

Recommended Semester Hours, Degree Levels, and Subject Areas

Course Number	Course Title	Semester Hours	Degree	Subject Areas	UIU Course
LOMA 280	Principles of Insurance	2	LD	Business, Insurance, or as General Elective	Elective <i>(lower-division)</i>
LOMA 281	Meeting Customer Needs with Insurance and Annuities	2	LD	Business, Insurance, or as General Elective	Elective <i>(lower-division)</i>
LOMA 286	Principles of Financial Services and Products <i>(Discontinued)</i>	3	LD	Financial Services	Elective <i>(lower-division)</i>
LOMA 290	Insurance Company Operations	3	LD	Business, Insurance, or as General Elective	Elective <i>(lower-division)</i>
LOMA 291	Improving the Bottom Line: Insurance Company Operations	3	LD	Business, Finance, Insurance, or as General Elective	Elective <i>(lower-division)</i>
LOMA 301	Insurance Administration	3	LD	Insurance	Elective <i>(lower-division)</i>
LOMA 302	The Policy Lifecycle: Insurance Administration	3	LD	Insurance	Elective <i>(lower-division)</i>
LOMA 305	Personal Financial Planning <i>(Discontinued)</i>	3	UD	Financial Services	Elective <i>(upper-division)</i>
LOMA 307	Business and Financial Concepts for Insurance Professionals	3	LD/UD	Business, Finance, Insurance, or as General Elective	General Elective <i>(upper-division)</i>
LOMA 308	The Business of Insurance — Applying Financial Concepts	3	LD/UD	Business, Finance, Insurance, or as General Elective	BA 341 <i>(upper-division)</i>

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Course Number	Course Title	Semester Hours	Degree	Subject Areas	UIU Course
LOMA 311	Business Law for Financial Services Professionals	3	UD	Insurance, Financial Services	Elective (upper-division) #
LOMA 316	Business Law for Financial Services Professionals — Canada	3	UD	Insurance, Financial Services	Elective (upper-division) #
LOMA 320	Insurance Marketing	3	UD	Business, Marketing, or Insurance	BA 208 (upper-division) ##
LOMA 321	Marketing in Financial Services	3	LD/UD	Business administration, Marketing	BA 208 (lower-division) # ##
LOMA 326	Financial Services Marketing <i>(Discontinued)</i>	3	UD	Marketing in a Business Curriculum	BA 208 (upper-division) ##
LOMA 330	Management Principles and Practices <i>(Discontinued)</i>	3	LD/UD	General Management	BA 210 (lower-division)
LOMA 335	Operational Excellence in Financial Services	3	UD	Business, Insurance, or as General Elective	General Elective (upper-division)
LOMA 351	Financial Services Environment <i>(Discontinued)</i>	3	UD	Finance	BA 341 (upper-division)
LOMA 356	Investment Principles and Institutional Investing <i>(Discontinued)</i>	3	UD	Financial Services	Elective (upper-division)
LOMA 357	Institutional Investing: Principles and Practices	3	LD/UD	Business administration, finance	Elective (upper-division)
LOMA 361	Accounting and Financial Reporting in Life Insurance Companies	3	UD	Financial Accounting or as Survey of Accounting for Non-Accounting Majors	Elective (upper-division)
LOMA 371	Risk Management and Product Design for Insurance Companies	3	UD	Finance, Insurance	BA 352 (upper-division)
LOMA 380	Financial Services and Products for Organizations <i>(Discontinued)</i>	3	UD	Business Administration	Elective (upper-division)
ACS 100	Foundations of Customer Service	3	LD	Business Administration, Professional Sales, Marketing	Elective (lower-division)
ACS 101	Customer Service for Insurance Professionals	2	LD	Business administration	Elective (lower-division)
SRI 111	Retirement Marketplace	3	LD/UD	Business Administration	Elective (lower-division)

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Course Number	Course Title	Semester Hours	Degree	Subject Areas	UIU Course
SRI 121	Retirement Savings and Investments	3	LD/UD	Business Administration	Elective (lower-division)
SRI 131	Planning for a Secure Retirement	3	LD/UD	Business Administration	Elective (lower-division)
SRI 210	Successful Retirement Outcomes	3	LD/UD	Business Administration	Elective (upper-division)
SRI 220	Retirement Marketing and Business Acquisition	3	LD/UD	Business Administration	Elective (upper-division)
SRI 230	Retirement Administration	3	LD/UD	Business Administration	Elective (upper-division)
SRI 500	Transforming Retirement Security	3	LD/UD	Business Administration	Elective (upper-division)
PCS 391	Customer Behavior: Consumer Behavior and Beyond <i>(Discontinued)</i>	3	UD	Marketing	BA 358 (upper-division)
PCS 392	Customer Contacts: Strategies and Operations <i>(Discontinued)</i>	2	LD/UD	Business Administration	Elective (lower-division)
PCS 393	Customer Relationship Management <i>(Discontinued)</i>	2	LD/UD	Business Administration	Elective (lower-division)
AIAA 200	Agency Administration <i>(Discontinued)</i>	3	LD/UD	Office Management, Administrative Office Systems	Elective (lower-division)
UND 386	Underwriting Life and Health Insurance	3	LD/UD	Business Administration, Insurance	Elective (upper-division)
AIAF 400	Statutory Accounting for Life and Health Insurers <i>(Discontinued)</i>	3	UD	Insurance, Accounting, Business Administration	Elective (upper-division)
AIRC 410	Regulatory Compliance: Companies, Producers, and Operations <i>(Discontinued)</i>	2	UD	Insurance	Elective (upper-division)
AIRC 411	The Regulatory Environment for Life Insurance	3	UD	Business Administration, Insurance	Elective (upper-division)
AIRC 420	Regulatory Compliance: Insurance and Annuity Products <i>(Discontinued)</i>	2	UD	Insurance	Elective (upper-division)

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Course Number	Course Title	Semester Hours	Degree	Subject Areas	UIU Course
AIRC 421	Regulation of Life Insurance Products, Sales, and Operations	3	UD	Business Administration, Insurance	Elective (upper-division)
AAPA 273	Annuity Principles and Products <i>(Discontinued)</i>	1	UD	Insurance, Business Administration	Elective (upper-division)
AAPA 283	Marketing, Distribution, and Uses of Annuities <i>(Discontinued)</i>	1	UD	Insurance, Business Administration	Elective (upper-division)
AAPA 303	Annuity Systems and Administration <i>(Discontinued)</i>	1	UD	Insurance, Business Administration	Elective (upper-division)
AAPA 313	Financial Aspects of Annuities <i>(Discontinued)</i>	2	UD	Insurance, Business Administration	Elective (upper-division)
AAPA 323	Regulation and Taxation of Annuities <i>(Discontinued)</i>	1	UD	Insurance, Business Administration	Elective (upper-division)
ARA 440	Reinsurance Administration	2	UD	Insurance, Business Administration	Elective (upper-division)

Note:

The course list above with LOMA course number, course title, semester hours, degree and subject areas are from LOMA.org at the page listed below. Academic credits recommendations are subject to change without notice.

The academic credit recommendations were assessed and provided by National College Credit Recommendation Service (CCRS) and published on <https://www.loma.org/HelpCenter/Credit/Recommendations.aspx>.

Lower-division transfer work will not contribute to the upper-division credit requirement at UIU.

A maximum of 78 lower-division semester credits may be transferred from accredited institutions to apply toward the minimum 120 semester credits required for a degree.

These 78 semester credit include:

- A. No more than nine semester credits from Exercise and Sports Studies (EXSS) activity courses, including transcribed intercollegiate athletics.
- B. No credits from courses identified by Upper Iowa University as remedial or developmental (except for articulated intensive English credits from partner institutions).
- C. No more than 30 semester credits from one-year occupational diploma programs.

Every effort has been made to ensure the accuracy and completeness of the above course transfer guide. The Office of the Registrar of Upper Iowa University reserves the right to make corrections, additions, and deletions as necessary.