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| OFFICE OF APPRENTICESHIP  BULLETIN | **NO.**  2024-38 |
| **DATE**  February 2, 2024 |

**TO:** NATIONAL APPRENTICESHIP SYSTEM STAKEHOLDERS

OFFICE OF APPRENTICESHIP STAFF

STATE APPRENTICESHIP AGENCIES

**FROM:** JOHN V. LADD /s/

Administrator, Office of Apprenticeship

**SUBJECT:** New National Occupational Framework (NOF) Apprenticeable Occupation: Insurance Sales Agent

1. **Purpose.** To inform the staff of OA, State Apprenticeship Agencies (SAA), Registered Apprenticeship program sponsors, and other Registered Apprenticeship partners of the following new National Occupational Framework (NOF) to an apprenticeable occupation: Insurance Sales Agent
2. **Action Requested.** OA staff should familiarize themselves with this bulletin and the attached Work Process Schedule and Related Instruction Outline, as a source for developing apprenticeship standards and/or providing technical assistance.

Insurance Sales Agent will be added to the List of Occupations Recognized as Apprenticeable by OA located on www.apprenticeship.gov. A suggested Work Process Schedule and Related Instruction Outline are attached.

1. **Summary and Background.**

Summary – The occupation Insurance Sales Agent was submitted by Mr. Zachary Boren, Senior Policy Program Manager on behalf of Urban Institute, were processed by Joseph L. Olivere and approved by the OA Administrator on January 25, 2024.

The National Office has approved a new National Occupational Framework (NOF), developed in partnership with the Urban Institute. This NOF has met industry standards and approval; it covers job titles and occupational pathways, related functions and performance criteria, as well as academic, workplace and personal competencies for job success. While use of NOFs in developing standards utilizing the competency-based training approach is voluntary, no additional vetting of a Work Process Schedule (WPS) utilizing the NOF should be required where a program aligns to the occupational framework described in a NOF, beyond the basic requirements set forth in 29 CFR Part 29. While on-the-job learning (OJL) is ordinarily outlined in the WPS, sponsors who utilize a NOF must develop the Related Instruction Outline, which should be included in the standards. Within certain limits, the sponsors of NOF apprenticeship programs are permitted to customize the job functions or competencies contained in a NOF for the Insurance Sales Agent occupation.

However, OA encourages the use of all core competencies to be included in the approved WPS.

Background –

***New/Revised Occupation Background -*** Under 29 CFR section 29.4, an occupation for a RAP must meet the following criteria to be determined apprenticeable:

1. Involve skills that are customarily learned in a practical way through a structured, systematic program of on-the job supervised learning:
2. Be clearly identified and commonly recognized throughout an industry;
3. Involve the progressive attainment of manual, mechanical, or technical skills and knowledge which, in accordance with the industry standard for the occupation, would require the completion of at least 2,000 hours of on-the-job learning to attain; and
4. Require related instruction to supplement the on-the job learning.
5. **New NOF Apprenticeable Occupation.** The occupation Insurance Sales Agent was submitted for an apprenticeability determination.

Insurance Sales Agent  
O\*NET-SOC CODE: 41-3021.00

RAPIDS Code: 3068CB

Type of Training: Competency-based (1.5 years)

Insurance Sales Agents perform the following duties:

* Customer support and service
* Sales and relationship management
* Demonstrates foundational knowledge of varying products and services
* Articulates and implements proper procedures for remedy when a compliance issue arises
* Manages consumer data privacy in compliance with all federal, state, and local regulations
* Stays up to date on continuing educational requirements for licensure
* Demonstrates strong communication and public speaking skills

Insurance sales agents are professionals who sell insurance policies to individuals and businesses. Their primary responsibility is to help clients understand various insurance products and choose policies that meet their needs. The responsibilities of Insurance Sales Agents include but are not limited to the following: client consultation, product knowledge, sales, preparing quotes on policy packages, policy renewals, claims assistance, maintaining a book of business, networking, and operating within all compliance guidelines. Insurance Sales Agents are responsible for following ethical and accountable sales practices as they assist their clients in navigating various insurance policies to meet personal and business insurance needs.

Apprenticeship Prerequisites:

Candidates should demonstrate a willingness to help others, an entrepreneurial spirit, and an inclination to learn. Candidates must have a high school diploma, GED, or equivalent. There are numerous licensing requirements dependent upon the type of insurance sold and location. Related technical instruction, along with on-the-job experience outlined by this national occupational framework, will prepare apprentices to sit for such license exams.

1. **Inquiries.** If you have any questions, please contact Joseph L Olivere, Apprenticeship and Training Representative, Division of Standards and Quality at (202) 693-5179.
2. **Attachments.**

