

Records of the
Insurance Institute of America (IIA)
1910-2000

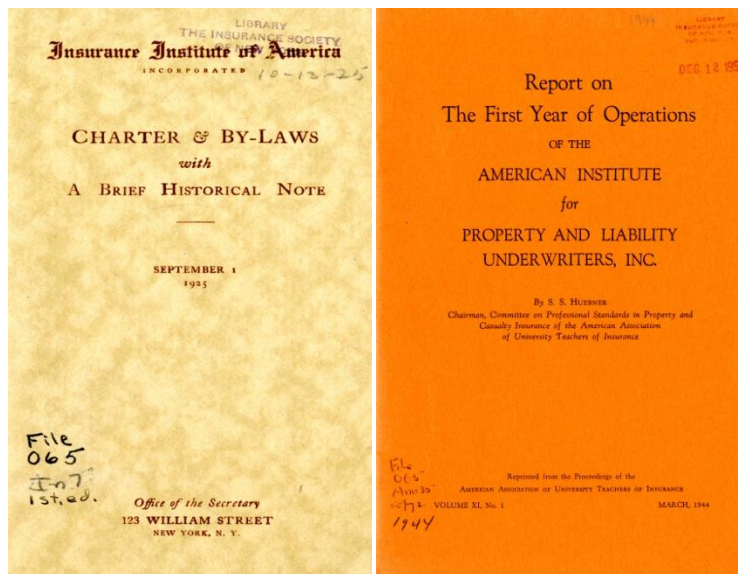
and the

American Institute for Property and
Liability Underwriters (AIPLU)
1941-2000

5.7 linear feet
(11 boxes)

SC 23

Processed by Alyse Hennig
July 2015



Kathryn and Shelby Cullom Davis Library
Archives and Special Collections
St. John's University

Access

An appointment is necessary to use this collection. Please review the library's access and membership policies. Access to certain materials may be restricted at the discretion of the library due to preservation concerns.

Preferred Citation

Records of the Insurance Institute of America, 1910-2000, and the American Institute for Property and Liability Underwriters, 1944-2000. Kathryn and Shelby Cullom Davis Library, St. John's University.

Copyright

Materials may be subject to copyright restrictions. It is the responsibility of the researcher to request permission from the copyright holder for further reproduction.

Historical Note

The Insurance Institute of America (IIA), founded in 1909, is a nonprofit organization offering educational programs and professional certification to people in the property and liability insurance business. They offer programs in both general education in insurance principles and specialized education in fields such as underwriting, claims, risk management, and reinsurance.

The American Institute for Property and Liability Underwriters (AIPLU) was founded in 1942 by S. S. Huebner and the Wharton School of the University of Pennsylvania. It is an "independent nonprofit organization providing educational programs and professional certification to people engaged in the property and casualty insurance industry." The AIPLU also founded the CPCU designation in 1942.

Dr. Harry J. Loman, a chief executive officer of the AIPLU, helped promote awareness, acceptance, and respect for the CPCU examinations and designation. He was part of the formation of the Society of Chartered Property and Casualty Underwriters (CPCU Society) in 1944, for members who have gained the CPCU accreditation. It has local chapters across the United States organized by regions. The Harry J. Loman Foundation was formed by the CPCU Society in 1961.

The IIA combined operations with the AIPLU in 1953. They still maintain their separate identities while combining operations and coordinating their educational offerings. The name of the AIPLU was changed in 1992 to the American Institute for Chartered Property Casualty Underwriters (AICPCU). Harry J. Loman was also the first dean, and later, the president, of the AICPCU. The AICPCU and IIA were rebranded as The Institutes in 2009.

Reference: <http://www.theinstitutes.org/about-us/our-history>

Scope and Content

This collection consists of the records of two organizations, the IIA and the AIPLU. The majority of documents in the collection were created before these organizations changed names. In addition, the collection contains documentation on the CPCU Society and Harry J. Loman Foundation.

Most of the records were part of the files of Edward R. Hardy, founding member, as well as secretary and treasurer of the IIA, and Arthur C. Goerlich, trustee and secretary of the AIPLU. Hardy and Goerlich were based at the Insurance Society of New York, and housed their files at the library there. Other documents were gathered by the Insurance Society's librarians and added to the vertical file collection over many years. All of the documentation on these related organizations was combined into one collection.

Subject Terms

Insurance Institute of America.
American Institute for Property and Liability Underwriters.
American Institute for Chartered Property Casualty Underwriters.
The Institutes.
Society of Chartered Property and Casualty Underwriters.
Harry J. Loman Foundation.
Hardy, Edward Rochie, 1862-1951.
Goerlich, Arthur Cyrus, 1894-1975.
Insurance -- Study and teaching.

Organization

The records are organized into 4 series with several sub-series:

Series 1 – Insurance Institute of America (IIA)

- 1.1 – News clippings
- 1.2 – Educational programs and examinations

Series 2 – American Institute for Property and Liability Underwriters, Inc. (AIPLU)

- 2.1 – News clippings
- 2.2 – Educational programs and examinations
- 2.3 – Secretary's correspondence

Series 3 – IIA / AIPLU Annual Meetings

- 3.1 – IIA Meetings
- 3.2 – IIA / AIPLU Combined Meetings

Series 4 – IIA / AIPLU Financial

Container List

Series 1 – Insurance Institute of America (IIA)			
Box	Folder	Title	Date Range
1	1	Charter and Bylaws with a Brief Historical Note	1925-1948
	2	Brochures about the IIA	1926-1949
	3	Seal of the IIA	1948
	4	List of IIA publications	1930
	5	The Flying Post (Bulletin)	1936, 1941
	6	Edward Rochie Hardy Prize	1953-1961
	7	Certificate of Fellowship for Arthur C. Goerlich	October 25, 1949
	8	Resolutions of appreciation	1954-1958
	9	Resolutions of appreciation	1960-1963
	10	Report of the President/Executive Vice President	1953-1963
Sub-series 1.1 – News clippings			
	11	News clippings	1910-1939
	12	News clippings	1940-1949
	13	News clippings	1950-1959
	14	News clippings	1960-1974
Sub-series 1.2 – Educational programs and examinations			
	15	History of the IIA examinations	1910-1911
	16	Insurance study clubs as IIA members	1916
	17	Remarks on the Education Committee and value of the courses, by H. L. Jamison	October 30, 1923
	18	"What the Insurance Course has Meant to Me" by Milton B. Pollock	November 17, 1931
	19	Education Conference	1927
	20	Education Committee	circa 1940
	21	Education Committee	1949
	22	Education Committee	1950
	23	Education Committee	1951
	24	Examination questions	1914-1940
	25	Syllabi of courses in insurance	1940-1950
	26	Educational program brochures	1953-1960
	27	Educational program brochures	1960-1965
	28	Educational program brochures	1965-1969
	29	Educational program brochures	1980-1983
	30	Examination information	1953
	31	Examination and course information	1962-1964
	32	Examination questions	1964
	33	Examination statistics	1953-1963
	34	Final certificates awarded (press releases)	1955-1964

Series 2 – American Institute for Property and Liability Underwriters, Inc. (AIPLU)			
Box	Folder	Title	Date Range
2	1	Minutes of the meeting of property and casualty executives to consider the advisability of adopting a professional program of education comparable to the CLU movement in life insurance	May 16, 1941
	2	AIPLU in process of establishing award of CPCU designation	February 12, 1942
	3	AIPLU announces educational program and standards for CPCU designation	March 5, 1942
	4	AIPLU articles of incorporation	March 10, 1942
	5	Draft of proposed AIPLU bylaws	March 19, 1942
	6	AIPLU bylaws	March 19, 1942
	7	Standards for a proposed American College (or Institute) of Property and Casualty Underwriters, by S.S. Huebner	n.d.
	8	Proposed American College of Property and Casualty Underwriters	n.d.
	9	Suggested standards for attainment of designation	n.d.
	10	Recommendations for advisory committee	n.d.
	11	Preliminary survey for committee on curriculum and education	n.d.
	12	"Early Formative History [of the AIPLU]", by S.S. Huebner	August 19-28, 1954
	13	Historical Background of the AIPLU	March 1942
	14	Annual Reports of the AIPLU	1943-1945
	15	New Address of the AIPLU, IIA, and CPCU Society	March 27, 1961
	16	Dedication of Huebner Hall, at Bryn Mawr, Pennsylvania	June 1-2, 1961
	17	Harry J. Loman Foundation	1961-1984
	18	CPCU Incentive Fund and 1945 Prizes	1945
	19	Brochure, "CPCU, Its Purpose and Meaning"	1953-1965
	20	CPCU directory	1952-1956
	21	Annual meeting and seminar, conferment of CPCU designations	1950-1960
	22	CPCU conferment	1977
	23	"CPCU Annals" author's manual	1960
	24	AIPLU and CPCU Society press releases	1958-1959
	25	"A Positive Approach to Insurance" by W. Ellery Allyn, address at CPCU conferment ceremony	September 8, 1950
	26	"Insurance Education and Its Present-Day Significance", by H. C. Conick, address at CPCU conferment ceremony	October 14, 1952
	27	"Who Should Acquire the CPCU Designation?" by Harry J. Loman	September 17, 1955
	28	"The Development of CPCU" by Dr. Edwin S. Overman, address at 62 nd Annual Convention NAIA	October 7, 1958
	29	CPCU Society membership survey results	July 1981
	30	Employer policy on IIA and CPCU expenses	1977-1981
	31	CPCU Society chapters	1951-1984
	32	Code of professional ethics of the AIPLU	1976
	33	Memo regarding personal liability of CPCU's	1948
	34	Report of Special Committee...Future Needs for Physical Facilities	July 25, 1957

		of National Insurance Educational Organizations...	
	35	New building construction, bylaws, meeting minutes	1976
3	1	Encouraging CPCU and IIA Participation	1964
	2	Bylaws of IIA and AIPLU	1974
	3	AIPLU blank stationary	n.d.
	4	Resolutions of appreciation - AIPLU	1947
	5	Resolutions of appreciation - AIPLU	1949
	6	Resolutions of appreciation - AIPLU	1950
	7	Resolutions of appreciation - AIPLU	1951
	8	AIPLU meeting minutes and annual reports	1961
	9	AIPLU meeting minutes and annual reports	1962
	10	AIPLU meeting minutes and annual reports	1963
	11	IIA/AIPLU Report of the President	1965-1985
	12	CPCU Society annual reports	1973-1979
	13	Annual report of member organizations (The Institutes)	1978-1979
Sub-series 2.1 – News clippings			
	14	News clippings	1940-1949
	15	News clippings	1940-1949
	16	News clippings	1950-1959
	17	News clippings	1960-1969
	18	News clippings	1970-1979
	19	News clippings	1980-1989
Sub-series 2.2 – Educational programs and examinations			
4	1	Refresher course outline for CPCU examination	1942-1943
	2	Instructions for CPCU examination	1943
	3	Application and examination statistics	1943
	4	CPCU examinations part I questions	1944-1945
	5	CPCU examinations part I study outline	August 1948
	6	Course outline for CPCU examinations	1948
	7	Revised CPCU curriculum	September 1959
	8	CPCU/IIA public courses	1981-1982
	9	Application, study group, and examination statistics	1962-1963
	10	List of persons who completed CPCU examinations	1962-1963
	11	CPCU/IIA and AICPCU/IIA course catalogs	1968-2000
	12	Procedure followed in grading examinations	n.d.
Sub-series 2.3 – Secretary's correspondence			
5	1	Secretary's correspondence	1947
	2	Secretary's correspondence	1948
	3	Secretary's correspondence	1949
	4	Secretary's correspondence	1950
	5	Secretary's correspondence	1951

	6	Secretary's correspondence	1952
	7	Secretary's correspondence	1953
	8	Secretary's correspondence	1954
	9	Secretary's correspondence	1955
	10	Secretary's correspondence	1956
	11	Secretary's correspondence	1960
	12	Secretary's correspondence	1961
	13	Secretary's correspondence	1962
	14	Secretary's correspondence	1963
	15	Secretary's correspondence	1964

Series 3 – IIA / AIPLU Annual Meetings			
Sub series 3.1 – IIA Meetings			
Box	Folder	Insurance Institute of America	Date
6	1	2nd Annual conference proceedings	May 10, 1910
	2	7th Annual conference proceedings	June 15-17, 1915
	3	13th Annual conference proceedings	October 25, 1921
	4	14th Annual conference proceedings	October 24, 1922
	5	15th Annual conference proceedings	October 30, 1923
	6	16th Annual conference proceedings	December 12, 1924
	7	17th Annual conference proceedings and correspondence	October 27, 1925
	8	18th Annual conference proceedings and correspondence	October 26, 1926
	9	19th Annual conference proceedings and correspondence	October 25, 1927
	10	20th Annual conference proceedings	October 23, 1928
	11	21st Annual conference proceedings	October 22, 1929
	12	22nd Annual conference proceedings	October 28, 1930
	13	22nd Annual conference correspondence	October 28, 1930
	14	23rd Annual conference proceedings	October 27, 1931
	15	23rd Annual conference correspondence	October 27, 1931
	16	24th Annual conference proceedings	October 25, 1932
	17	25th Annual conference proceedings	October 24, 1933
7	1	26th Annual conference proceedings	October 23, 1934
	2	27th Annual conference proceedings	October 22, 1935
	3	28th Annual conference proceedings	October 27, 1936
	4	29th Annual conference proceedings	October 26, 1937
	5	29th Annual conference correspondence	October 26, 1937
	6	30th Annual conference proceedings	October 25, 1938
	7	30th Annual conference correspondence	October 25, 1938
	8	31st Annual conference proceedings	October 24, 1939
	9	31st Annual conference correspondence	October 24, 1939
	10	32nd Annual conference proceedings	October 22, 1940

	11	32nd Annual conference correspondence	October 22, 1940
	12	32nd Annual conference correspondence	October 22, 1940
	13	33rd Annual conference proceedings	October 28, 1941
	14	34th Annual conference proceedings	October 27, 1942
	15	35th Annual conference proceedings	October 26, 1943
	16	36th Annual conference proceedings	October 24, 1944
	17	37th Annual conference proceedings	October 23, 1945
	18	38th Annual conference proceedings	October 22, 1946
	19	39th Annual conference secretary's report	October 28, 1947
	20	Delegates to annual conference	n.d.
8	1	Annual conference minutes and correspondence	1953
	2	Annual conference correspondence	1954
	3	Annual conference proceedings and minutes	1955
	4	Annual conference proceedings and minutes	1956
	5	Annual conference proceedings and minutes	1957
	6	Annual conference proceedings and minutes	1958
	7	Annual conference proceedings and minutes	1959
	8	Annual conference proceedings and minutes	1960
	9	Annual conference minutes and correspondence	1961
	10	Annual conference proceedings	1962
	11	Annual conference minutes and correspondence	1962
	12	Annual conference proceedings	1963
	13	Annual conference minutes and correspondence	1963
	14	36th-43rd Annual conference minutes – copies	1944-1951
	15	36th-43rd Annual conference minutes – originals	1944-1951
	16	Executive committee meeting minutes – copies	1948-1953
	17	Executive committee meeting minutes – originals	1948-1953
	18	Board of governors meeting minutes – copies	1944-1952
	19	Board of governors meeting minutes – originals	1944-1952

Sub series 3.2 – IIA / AIPLU Combined Meetings			
9	1	Combined annual meeting minutes	1964
	2	Combined annual meeting minutes	1965
	3	Combined annual meeting minutes	1966
	4	Combined annual meeting minutes	1967
	5	Combined annual meeting minutes	1968
	6	Combined annual meeting minutes	1969
	7	Combined annual meeting minutes	1970
	8	Combined annual meeting minutes	1971
	9	Combined annual meeting minutes	1972
	10	Combined annual meeting minutes	1973

	11	Combined annual meeting minutes	1974
	12	Combined annual meeting minutes	1975
	13	Combined annual meeting minutes	1977
	14	Combined annual meeting minutes	1978
	15	Combined annual meeting minutes	1979
	16	Combined annual meeting minutes	1980
	17	Combined annual meeting minutes	1981
	18	Combined annual meeting minutes	1982
	19	Combined annual meeting minutes	1983
	20	Combined annual meeting minutes	1984
	21	Combined annual meeting minutes	1985
	22	Combined annual meeting minutes	1986
	23	Combined annual meeting minutes	1987
	24	Combined annual meeting minutes	1988

Series 4 - IIA / AIPLU Financial			
Box	Folder	Title	Date Range
10	1	Audit reports - IIA	1923, 1924, 1925
	2	Audit reports - IIA	1926, 1927, 1928
	3	Audit reports - IIA	1929, 1930, 1931
	4	Audit reports - IIA	1932, 1933, 1934
	5	Audit reports - IIA	1935, 1936, 1937
	6	Audit reports - IIA	1938, 1939, 1940
	7	Audit reports - IIA	1941, 1942, 1943
	8	Audit reports - IIA	1944, 1945, 1946
	9	Financial reports - AIPLU	1948-1951
	10	Financial reports - AIPLU	1952-1954
	11	Financial reports - IIA	1953
	12	Financial reports - IIA	1954-1955
	13	Financial reports - AIPLU	circa 1955
	14	Financial reports - IIA	1957
	15	Financial reports - AIPLU	1957
	16	Financial reports - IIA	1958
	17	Financial reports - AIPLU	1958
	18	Financial reports - IIA	1959
	19	Financial reports - AIPLU	1959
	20	Financial reports - IIA	1960
	21	Financial reports - IIA	1961
	22	Financial reports - IIA	1962
	23	Financial reports - IIA	1963
	24	Financial reports - IIA	1964

Records of the IIA/AIPLU 1910-2000
 Kathryn and Shelby Cullom Davis Library

	25	Financial reports - IIA	1965
	26	Financial reports - IIA	1966
	27	Financial reports - IIA/AIPLU	1967
	28	Financial reports - IIA/AIPLU	1968
	29	Financial reports - IIA	1969
	30	Financial reports - IIA	1970
	31	Financial reports - IIA	1971
	32	Financial reports - IIA	1972
	33	Financial reports - IIA/AIPLU	1973
	34	Financial reports - IIA	1974
11	1	Financial reports - IIA/AIPLU	1975
	2	Financial reports - IIA/AIPLU	1976-1977
	3	Financial reports - IIA/AIPLU	1977-1978
	4	Financial reports - IIA/AIPLU	1978-1979
	5	Financial reports - IIA/AIPLU	1980
	6	Financial reports - IIA/AIPLU	1981-1982
	7	Financial reports - IIA/AIPLU	1983
	8	Financial reports - IIA/AIPLU	1984
	9	Financial reports - IIA/AIPLU	1985
	10	Financial reports - IIA/AIPLU	1986
	11	Financial reports - IIA/AIPLU	1987