

STEP BY STEP CHECKLIST

A complete checklist to follow along with the *Ultimate Guide to Becoming a Great Adjuster* blog post.

STEP ONE

DECIDE IF YOU TRULY WANT TO BE AN ADJUSTER

- UNDERSTAND WHAT AN ADJUSTER IS
The basic task of an adjuster is to handle claims for an insurance company.
- POSSESS THE REQUIRED SKILLS
Must have great communication skills, be organized, self motivated and disciplined.
- BE PREPARED TO WORK HARD!

NOTES:

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STEP TWO

REVIEW THE DIFFERENT TYPES OF ADJUSTERS

- STAFF ADJUSTER
Works solely for the insurance company of their choice.
- INDEPENDENT ADJUSTER
An adjuster that works for a third-party adjusting firm and/or as an individual 1099 employee.
- CATASTROPHE ADJUSTER
Can be both staff and independent. Travels outside of their normal area.

NOTES: WHICH ROUTE WILL YOU TAKE?

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STEP THREE

LOOK UP YOUR STATE LICENSE REQUIREMENTS

- DOES YOUR STATE REQUIRE A LICENSE?
YES NO

- ARE YOU REQUIRED TO TAKE A PRE-LICENSING COURSE?
YES NO

- PRINT OUT THE LIST OF REQUIRED TASKS & DOCUMENTS.

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STEP FOUR

PREPARE FOR YOUR NEW CAREER

- KNOWLEDGE OF INSURANCE
You cannot adjust a claim if you do not know what is and isn't covered under standard insurance policies.
- XACTIMATE(XA) TRAINING
Many firms use XA- consider an online course. At the very minimum, download the demo and become familiar.
- GEAR: DOWNLOAD **GEAR CHECKLIST**
You do not need to buy every item listed.

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STEP FIVE

START LOOKING FOR A JOB

- PREPARE YOUR RESUME
Be sure to list skills used in your prior career that are relevant to adjusting.
- START APPLYING TO FIRMS
- KEEP TRACK OF WHERE YOU APPLIED WITH THIS SPREADSHEET

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STEP SIX

PREPARE

- BE PREPARED TO MANAGE YOUR MONEY.
In this industry, work is not guaranteed and your income may be commission only.
- START TRACKING ALL EXPENSES RELATED TO INSURANCE ADJUSTING.
IA's should download quick books self insured. Keep track of every single related expense.
- PREPARE A HOME OFFICE
Set up a quiet, organized space with your laptop, scanner, and printer.

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STEP SEVEN

STAY INFORMED

- CE CREDITS
If you are licensed, you will need to confirm how many CE credits are required to renew your license. This information should be on your state's insurance website.
- KEEP LEARNING
Just because you are now licensed does not mean that you know everything there is to be an adjuster. You must keep learning. Attend conferences, seminars, webinars. The more knowledge, the better.

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RESOURCES

LIST OF RESOURCES

- [GEAR CHECKLIST](#)
- [APPLICATION SPREADSHEET](#)
- [ADJUSTERPRO.COM](#)
- [XACTIMATE DEMO](#)
- [QUICKBOOKS](#)

NEED ADDITIONAL HELP?

[Contact me](#) today to discuss! I offer career consulting for those wanting to become a property adjuster.