



## 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

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- 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

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- 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

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- 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.

NOTES:



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### STEP FOUR

#### PREPARE FOR YOUR NEW CAREER

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- 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.*

NOTES:



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STEP FIVE

### START LOOKING FOR A JOB

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- 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

NOTES:



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### STEP SIX

#### PREPARE

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- 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.

NOTES:



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STEP SEVEN

### STAY INFORMED

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- 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.*

NOTES:



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### RESOURCES

#### LIST OF RESOURCES

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