

EDUCATION

FOR INSURANCE SUPERHEROES



QUICK

Quick! To our training schedule! Our education goal is simple: To give you the tools to be an insurance hero. Through IA&B education, you can conquer the insurance world for your clients.

REGISTER

Register for an in-person, live webinar course, or on-demand course. IA&B offer courses for every learning style. Check out insurance courses and register today.



TOGETHER

Thousands of insurance professionals attend IA&B courses each year. People turn to IA&B to earn licenses or designations, learn new sales techniques, and get CE credits. Join others and register today.

IA&B IS THE RECIPIENT OF THE:



DIAMOND AWARD FOR EDUCATION



TO REGISTER
CALL: 800-998-9644, OPTION 1
ONLINE: IABFORME.COM





CERTIFIED INSURANCE SERVICE REPRESENTATIVE (CISR)

The Certified Insurance Service Representative (CISR) Program empowers outstanding individuals to provide exceptional account management and customer service.

WHO SHOULD ATTEND CISR COURSES?

CISR courses are designed for individuals working in a customer service capacity.

EARN A PRESTIGIOUS CISR DESIGNATION

Within three calendar years, take five courses of your choice and pass the exam that follows the course. The exam is required only if earning the designation. Insurance professionals are welcome to take CISR courses without the intent to earn a designation.



Oct 4	Commercial Property	Mechanicsburg, PA
Oct 12	Personal Residential	Live Webinar
Oct 20	Agency Operations	Live Webinar
Oct 26	Commercial Casualty I	Live Webinar
Nov 2	Commercial Property	Live Webinar
Nov 9	Personal Auto	Live Webinar
Nov 16	Commercial Casualty I	Mars, PA
Nov 30	Commercial Casualty II	Live Webinar
Dec 6	Life & Health Essentials	Live Webinar
Dec 7	Personal Lines Miscellaneous	Live Webinar
Dec 13	Personal Lines Miscellaneous	Mechanicsburg, PA
Dec 14	Elements of Risk Management	Live Webinar



Arrival or log into webinar: 7:30 - 7:55 AM
In-person class or webinar: 8:00 AM - 3:45 PM | Exam Review: 3:45- 4:15 PM



In-Person: Member/Non-Member: \$205
Webinar: Member/Non-Member: \$161
Includes course materials and CE fees. In-person classes include lunch.



CE details available on individual course information webpages.



If earning a designation, a timed, one-hour online exam will be available after 4:15 PM the day of class through Thursday of the week following your in-person class or webinar.



LOSS CONTROL CREDIT for Utica policyholders with CIC, CRM or CISR designations *except* Agency Operations, which credits any Utica policyholder.



THE NATIONAL ALLIANCE AND IA&B

IA&B brings you the popular educational programs developed by The National Alliance for Insurance Education & Research. We offer:

- Certified Insurance Counselor (CIC) Program
- James K. Ruble Graduate Seminars
- Certified Insurance Service Representative (CISR) Program
- William T. Hold Seminars

The educational programs and research conducted by The National Alliance were built on a foundation of integrity, innovation, and imagination. These qualities commit us to act responsibly, to be accountable for our actions, to fulfill our obligations, and to inspire others with our relentless determination to achieve a standard of excellence in every endeavor.



WILLIAM T. HOLD SEMINARS

William T. Hold Seminars are one-day seminars designed specifically for individuals who have a concentrated role in customer service. The seminars offer topics that expand and support the CISR Program.

WHO SHOULD ATTEND WILLIAM T. HOLD SEMINARS?

Open to all insurance professionals. William T. Hold seminars are a great annual update option for CISR designees; however, holding the designation is not a requirement for attendance.



Nov 15	Commercial Lines	Live Webinar
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Log into webinar: 7:30 - 7:55 AM
Webinar: 8:00 AM - 4:00 PM



Member/Non-Member: \$161
Includes course materials and CE fees



PA/DE: 7 GEN | MD: 7 PC



NO EXAM



LOSS CONTROL CREDIT for Utica policyholders with CIC, CRM or CISR designations.



CERTIFIED INSURANCE COUNSELOR (CIC) PROGRAM

The Certified Insurance Counselor program is a nationally recognized and highly respected insurance professional designation. The CIC program is continuously reviewed, updated, and expanded to fit your professional needs.

WHO SHOULD ATTEND CIC COURSES?

- Licensed agents, brokers, and adjusters
- Insurance or risk management professionals with two years of experience

EARN A PRESTIGIOUS CIC DESIGNATION

Within five calendar years, take five CIC courses of your choice and pass the corresponding exams. The exam is required only if you are earning the designation. Insurance professionals are welcome to take CIC courses without the intent to earn a designation.



Nov 8-9	Personal Lines	Live Webinar
Nov 8-9	Personal Lines	Hunt Valley, MD

Hybrid class held simultaneously online & in-person



Arrival or log into webinar: 7:30 - 7:55 AM
In-person class or webinar: 8:00 AM - 5:00 PM. Exam review from 5:15 - 5:30 on first day is recommended for those earning the designation.



In-person: Member/Non-Member: \$450
Live Webinar: Member/Non-Member: \$420
Includes course materials and CE fees



PA/DE 16 GEN | MD 16 PC



If earning a designation, a timed, two-hour online exam (essay/short answer) will be available Mon thru Thurs the week following the last in-person class or webinar.



LOSS CONTROL CREDIT for Utica policyholders with CIC, CRM or CISR designations *except* Agency Management, which credits any Utica policyholder.



JAMES K. RUBLE GRADUATE SEMINARS

Respected throughout the industry as cutting-edge and market-focused – offering a variety of specialty, advanced, and high-interest topics. Take your coverage knowledge to new heights at a two-day James K. Ruble Graduate Seminar.

WHO SHOULD ATTEND JAMES K. RUBLE SEMINARS?

Any Certified Insurance Counselor (CIC) or Certified Risk Manager (CRM) designee who is looking to dive deeper into coverage topics that were covered at the CIC course level.



Oct 18-19	Live Webinar
Oct 18-19	King of Prussia, PA

Hybrid class held simultaneously online & in-person



Arrival or log into webinar: 7:30 - 7:55 AM
In-person class or webinar: 8:00 AM - 5:15 PM



In-person class or webinar:
Member/Non-Member: \$445
Includes course materials and CE fees



CE details available on individual course information webpages.



NO EXAM



LOSS CONTROL CREDIT for Utica policyholders with CIC, CRM or CISR designations.

OTHER COVERAGE LIVE CE WEBINARS

	Oct 4	9 AM-12 PM	That's Personal: Home & Auto Exposures Your Insured Doesn't Share (and Why That's Bad)
	Oct 4	1-4 PM	Is This Stuff for Real? Understanding & Insuring Emerging Risks
	Oct 5	2-3 PM	An Hour with Cathy: Three Commercial Property Insurance Problems and How to Fix Them
	Oct 6	9 AM-12 PM	Cyber - Evolution, Exposures, Incidents & Insurance
	Oct 6	1-4 PM	Nailed It: Understanding Insurance Requirements in Construction Contracts
	Oct 11	1-4 PM	Chris Amrhein's "Adventures in Aging": Social Security and Other Retirement Income Solutions
	Oct 12	2-3 PM	An Hour with Dave: Fast Facts About Flood
	Oct 13	9 AM-12 PM	Autos, Garages and Dealers - Oh My! Knowing the Difference
	Oct 25	9 AM-12 PM	Flood Insurance, FEMA, and the NFIP
	Oct 25	1-4 PM	Why Good People Do Bad Things: A Deep Dive Into Agency Ethics
	Oct 26	2-3 PM	An Hour with Nicole: Homeowners Loss Settlement Issues
	Oct 27	9 AM-12 PM	Homeowners in Real Life: Tales of Claims & Coverage
	Oct 27	1-4 PM	Agent's E&O: Duties, Best Practices, Operations, Workflows, & Certificates
	Nov 1	9 AM-12 PM	Personal Lines Coverage Concerns: Annoying But Important
	Nov 1	1-4 PM	Ethics: Essentials for the Insurance Producer
	Nov 2	2-3 PM	An Hour with Cathy: Additional Insured Endorsements for Contractors
	Nov 3	9 AM-12 PM	Certificates of Insurance and the Coverage Issues that Go With Them
	Nov 3	1-4 PM	Commercial Insurance Coverages, Court Cases & Chaos
	Nov 7	1-4 PM	Why Insurance to Value and Liability Limits are Always Wrong (and How to Fix That)
	Nov 10	9 AM-12 PM	Certificates and Additional Insureds: What Did I Do to Deserve This?!
	Nov 15	1-4 PM	Chris Amrhein's "Adventures in Aging": Medicare and Other Retirement Healthcare Solutions
	Nov 16	2-3 PM	An Hour with Sam: A Numbers Game - Mastering the Coverage Symbols in a Business Auto Policy
	Nov 17	9 AM-12 PM	Personal Lines Clients and Their New Normal
	Nov 17	1-4 PM	Agent's E&O: Defenses & Preventions for the Insurance Professional
	Nov 29	9 AM-12 PM	Planting the Seed: Agent Strategies to Get and Keep Agribusiness Insureds
	Nov 29	1-4 PM	Commercial Property - Direct vs Indirect Damage
	Nov 30	2-3 PM	An Hour with Dave: Fast Facts About Flood
	Dec 1	9 AM-12 PM	That's Personal: Home & Auto Exposures Your Insured Doesn't Share (and Why That's Bad)
	Dec 1	1-4 PM	Agent's E&O: Duties, Best Practices, Operations, Workflows, & Certificates
	Dec 6	9 AM-12 PM	Flood Insurance, FEMA, and the NFIP
	Dec 6	1-4 PM	Chris Amrhein's "Adventures in Aging": Social Security and Other Retirement Income Solutions
	Dec 7	2-3 PM	An Hour with Nicole: Personal Umbrella Issues & Answers
	Dec 8	9 AM-12 PM	More Money, More (Insurance) Problems? Mastering P&C Coverage for the Affluent Market
	Dec 8	1-4 PM	Why Good People Do Bad Things: A Deep Dive Into Agency Ethics
	Dec 13	9 AM-12 PM	Employment Practices Liability - A Coverage No Business Can Afford to Be Without
	Dec 13	1-4 PM	Personal & Commercial Lines Endorsements: Some Good, Some That Really Stink
	Dec 15	9 AM-12 PM	Homeowners in Real Life: Tales of Claims & Coverage
	Dec 15	1-4 PM	Growing Good Insurance: Using Property & Liability Endorsements to Fortify Farm Risks



1 HOUR WEBINARS: Member: \$25 | Non-Member: \$55 *Members save \$30!*
 3 HOUR WEBINARS: Member: \$75 | Non-Member: \$105 *Members save \$30!*
 4 HOUR WEBINARS: Member: \$100 | Non-Member: \$140 *Members save \$40!*



CE details available on individual course information webpages.






NO EXAM

CE ON-DEMAND COURSES

Perfect for busy insurance professionals. Take control of your own learning. Access CE self-paced, on-demand courses and learn at your own convenience – anywhere, anytime. For more information, go to iabforme.online/ondemand

E&O RISK MANAGEMENT LIVE WEBINARS

	Oct 27	1-4 PM	Agent's E&O: Duties, Best Practices, Operations, Workflows, & Certificates *
	Nov 17	1-4 PM	Agent's E&O: Defenses & Preventions for the Insurance Professional *
	Dec 1	1-4 PM	Agent's E&O: Duties, Best Practices, Operations, Workflows, & Certificates *



MEMBER: \$75 | NON-MEMBER: \$105
Members save \$30!



CE details available on individual course information webpages.



NO EXAM REQUIRED



* LOSS CONTROL CREDIT for Utica (PA, MD, DE) & SwissRe (Westport) (PA/DE) policyholders

E&O RISK MANAGEMENT ON DEMAND

TWO COURSES AVAILABLE:

- COMMERCIAL LIABILITY COVERAGE GAPS & HOW TO FILL THEM
- CP COVERAGE GAPS & HOW TO FILL THEM



AVAILABLE 24/7 at IABforME.com



CE details available on individual course information webpages.



MEMBER: \$75 | NON-MEMBER: \$105
Members save \$30!






PA|DE: 3 GEN | MD: 3 PC



LOSS CONTROL CREDIT for Utica (PA, MD, DE) & SwissRe (Westport) (PA/DE) policyholders

PA LICENSING STUDY COURSE

	Oct 11-13	P&C Licensing	Live Webinar
	Oct 11-13	P&C Licensing	Mechanicsburg, PA
	Nov 29-Dec 1	P&C Licensing	Live Webinar



Arrival or log into webinar: 7:30-7:55 AM
 In-person class or webinar: 8:00 AM - 5:00 PM



In-person: Member \$399 | Non-Member: \$519 *Members save \$120!*
 Live webinar: Member: \$299 | Non-Member: \$419 *Members save \$120!*
 Includes course materials & PLE fees. In-person classes include lunch.



24 Pre-Licensing Education Credits

GUARANTEE TO PASS

If you register for the Oct 11-13 course by Sept 9 and follow the provided study schedule, IA&B guarantees you will pass the exam. For Nov 29-Dec 1 course, register by Oct. 31. If you do not pass, you may attend another study course within 1 year at no charge. Updated course material fees may apply.

LICENSING SELF STUDY

OFFLINE: PA PROPERTY & CASUALTY (P&C) MANUAL

IA&B has written the book on P&C licensing exam preparation in Pennsylvania, and you can own it. With our P&C Pre-Licensing Manual, aspiring agents have the tools to significantly improve their chances of passing the licensing exam on the first try.

Member: \$219 +S&H | Non-Member: \$259 +S&H
Members save \$40!

ONLINE: LIFE & HEALTH: PA, MD, DE PROPERTY & CASUALTY: MD, DE

IA&B has partnered with ExamFX to bring you online learning. Whether you study better by reading, watching videos or taking online practice tests, ExamFX has a solution for you and IA&B's stamp of approval!

TWO OPTIONS FOR ONLINE STUDY

➔ VIDEO STUDY: This package includes learning with OnDemand Videos and access to the Interactive Learning Portal.

Member: \$167.96 | Non-Member: \$209.95 *Members save \$41!*

➔ LIVE ONLINE STUDY: This package includes all of the Video Study Package plus live instructor-led training sessions.

Member: \$255.96 | Non-Member: \$319.95 *Members save \$63!*

SCHOLARSHIP OPPORTUNITY

IA&B awards Licensing Study Scholarships throughout the year. For more information: IABforME.online/scholarships
 800-998-9644, ext. 104 | SarahJ@IABforME.com



SALES & MARKETING TRAINING

Get energized and learn how to generate qualified leads that will translate into sales and commission. These courses are developed specifically for insurance professionals, so you'll meet and network with people just like you!

Register for *one* or all *three* days.

WHO SHOULD ATTEND?

These seminars are open to any employee of an agency, insurance company or insurance-related business who wants to enhance or learn sales techniques.

BECOME A CERTIFIED PROFESSIONAL INSURANCE AGENT

Three Days. One Designation. No Exam.

Attend all three days and you'll earn the Certified Professional Insurance Agent (CPIA). There is no exam for this certification.

This training is developed by the American Insurance Marketing and Sales Society (AIMS).

	Nov 15	Position for Success	Mechanicsburg, PA
	Nov 16	Implement for Success	Mechanicsburg, PA
	Nov 17	Sustain Success	Mechanicsburg, PA

Registration: 8:00 - 8:25 AM
Class: 8:30 AM - 4:30 PM

MEMBER: \$205 | NON-MEMBER: \$245 PER DAY
Members save \$30!
Includes course materials, CE fees & lunch.

For each day: PA: 7 GEN | MD: 7PC | DE: 5 GEN/ETH

NO EXAM REQUIRED

LOSS CONTROL CREDIT for Utica policyholders

THANK YOU PLATINUM PARTNERS FOR SUPPORTING THE INDEPENDENT AGENT NETWORK.



SAVE TIME & MONEY

MEMBERS CAN TAKE ADVANTAGE OF THESE BENEFITS

LEGAL AND COMPLIANCE - #1 MOST USED MEMBER RESOURCE

Got a question? Looking for a resource? Members have full access to our online resources and our Legal and Compliance Team. Save time and contact Claire or Don.



Claire Pantaloni, CIC, CISR
Vice President, Advocacy

ACCESS MARKETS & CARRIER RELATIONS

IA&B Membership comes with market access. Plus, build relationships with carriers by utilizing resources like our agency agreement reviews and AppointmentLink.



Don Bankus
Director
Legal & Corporate Affairs

HR AND HIRING SOLUTIONS

Tap into member resources to help you manage your agency. In addition, receive discounts on Work At Home Vintage Experts (WAHVE), an industry-specific, contract staffing solution.

MARKETING, BRANDING, AND WEBSITES

Take advantage of the marketing resources like the IA&B library of consumer flyers. Make the most of your membership by working with our branding and online experts who specialize in the independent agency system. Also, PA and DE member agencies can benefit from the Trusted Choice Marketing Reimbursement Program.



INSURANCE FOR YOUR AGENCY

IA&B members have more options when it comes to professional liability programs that provide better value and protection.

ONLINE CE & EDUCATION

Receive member savings on our award-winning classroom and online trainings. You can continue to rely on IA&B's education team to answer your questions and help you understand CE requirements.

INDUSTRY NEWS

Score timely industry news that affects your business in our weekly Agent Headlines e-newsletter and monthly Primary Agent magazine.

DID YOU KNOW? MEMBERSHIP SUPPORTS ADVOCACY.

Your membership provides support for IA&B to be on the front lines in protecting your profession. IA&B staff and lobbyists work daily to advance laws and regulations that benefit independent agencies, while opposing those that could negatively affect your bottom line.



ANY QUESTIONS?

CONTACT TIM WONDER, IA&B VP-MEMBERSHIP

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OCT • NOV • DEC
2022

IN-PERSON CLASSES AVAILABLE THIS FALL

Oct 4	CISR - Commercial Property	Mechanicsburg, PA
Oct 11-13	P&C Licensing	Mechanicsburg, PA
Oct 18-19	James K Ruble	King of Prussia, PA
Nov 8-9	CIC - Personal Lines	Hunt Valley, MD
Nov 15	CPIA - Position for Success	Mechanicsburg, PA
Nov 16	CPIA - Implement for Success	Mechanicsburg, PA
Nov 16	CISR - Commercial Casualty I	Mars, PA
Nov 17	CPIA - Sustain Success	Mechanicsburg, PA
Dec 13	CISR - Personal Lines Miscellaneous	Mechanicsburg, PA



TO REGISTER

Call 800-998-9644, option 1

Online: IABforME.com

QUESTIONS?

Call 800-998-9644, option 2

Email: education@IABforME.com



Insurance Agents
& Brokers



IA&B is the premier resource and champion for independent insurance agents in PA, MD, and DE.

IA&B core hours of operation:
8:30 AM - 4:30 PM, Mon - Fri.