

EDUCATION

FOR INSURANCE SUPERHEROES

JANUARY - MARCH 2023



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 a live webinar or on-demand course. IA&B offers courses for every learning style. Check out the course schedule 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

IA&B





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.



Jan 11	Personal Residential	Live Webinar
Jan 18	Agency Operations	Live Webinar
Jan 25	Commercial Casualty 1	Live Webinar
Feb 1	Commercial Property	Live Webinar
Feb 8	Personal Auto	Live Webinar
Feb 22	Commercial Casualty 2	Live Webinar
Mar 1	Life & Health Essentials	Live Webinar
Mar 8	Other Personal Lines Solutions (formerly Personal Lines Misc.)	Live Webinar
Mar 15	Elements of Risk Management	Live Webinar



Log into webinar: 7:30 - 7:55 AM

Webinar: 8:00 AM - 3:45 PM

Exam Review: 3:45- 4:15 PM (Recommended for those earning a designation.)



Webinar: Member/Non-Member: \$161

Includes course materials and CE fees.



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.



Mar 22 Commercial Lines Live Webinar



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/MD/DE: Submitted for 7 credits



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.



Jan 10-11	Insurance Company Operations	Live Webinar
Feb 7-8	Commercial Casualty	Live Webinar



Log into webinar: 7:30 - 7:55 AM

Webinar: 8:00 AM - 5:00 PM.

Exam review: 5:15 - 5:30 on first day (Recommended for those earning a designation.)



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.



March 7-8 Live Webinar



Log into webinar: 7:30 - 7:55 AM

Webinar: 8:00 AM - 5:15 PM



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

	Jan 10	9 AM-12 PM	Homeowners Deep-Dive: What You Need to Know About the Most Recent Forms
	Jan 10	1-4 PM	Chris Amrhein's "Adventures in Aging": Medicare & Other Retirement Healthcare Solutions
	Jan 11	11 AM-12 PM	An Hour with Nicole: Everything You Need to Know About Insuring Work-From-Home Exposures
	Jan 11	2-3 PM	An Hour with Sam: The Policy's Position on Home-Sharing & How to Handle It
	Jan 12	9 AM-12 PM	Inflation & Personal Lines: Helping Insureds Understand Why It Matters & What to Do
	Jan 12	1-4 PM	Agent's E&O: Defenses & Preventions for the Insurance Professional
	Jan 17	9 AM-12 PM	Marriage, Kids, Money, Assisted Living & Everything Between: Home & Auto Exposures For Life
	Jan 17	1-4 PM	Planting the Seed: Agent Strategies to Get & Keep Agribusiness Insureds
	Jan 19	9 AM-12 PM	Bots, Crypto, Weed & Other Risks You Never Imagined Insuring (But Here We Are)
	Jan 19	1-4 PM	Why Good People Do Bad Things: A Deep Dive Into Agency Ethics
	Jan 24	1-4 PM	Lurking: Surprises In the Contractor's CGL Policy & Endorsements to Watch Out For
	Jan 25	2-3 PM	An Hour with Dave: All-Things Ordinance or Law (Personal & Commercial)
	Jan 26	1-4 PM	Covering Online Fraud & Employees Who Turn Out to Be Crooks
	Feb 1	2-3 PM	An Hour with Nicole: Why Personal Lines Deductibles Always Confuse Insureds
	Feb 2	9 AM-12 PM	Why Insurance to Value & Liability Limits are Always Wrong (and How to Fix That)
	Feb 2	1-4 PM	Claims That Will Convince Your Insured to Enhance Their Homeowners Coverage
	Feb 7	9 AM-12 PM	Certificates & Additional Insureds: What Did I Do to Deserve This?!
	Feb 9	9 AM-12 PM	"Wait...What the #^&* Just Happened?!" Fourteen Personal Lines Issues To Know Before It's Too Late
	Feb 9	1-4 PM	Chris Amrhein's "Adventures in Aging": Social Security & Other Retirement Income Solutions
	Feb 21	9 AM-12 PM	Cyber Coverage: Protecting Your Insureds From Hackers, Liars, & Really Bad Bots
	Feb 21	1-4 PM	Ethical Dilemmas in Insurance & the Responsibilities of Agents
	Feb 23	1-4 PM	Mastering Business Income: Tools & Tips to Keep Insureds Flush
	Feb 28	9 AM-12 PM	Agent's E&O: Duties, Best Practices, Operations, Workflows, & Certificates
	Feb 28	1-4 PM	Commercial Property: Recent Changes & Crucial Concepts
	Mar 1	2-3 PM	An Hour with Nicole: Everything You Need to Know About Insuring Work-From-Home Exposures
	Mar 2	9 AM-12 PM	More Money, More (Insurance) Problems? Mastering P&C Coverage for the Affluent Market
	Mar 2	1-4 PM	Growing Good Insurance: Property & Liability Endorsements to Fortify Farm Risks
	Mar 7	9 AM-12 PM	Marriage, Kids, Money, Assisted Living & Everything Between: Home & Auto Exposures For Life
	Mar 7	1-4 PM	Homeowners Deep-Dive: What You Need to Know About the Most Recent Forms
	Mar 9	9 AM-12 PM	All-Things Ethics: Agent Obligations, Standards, Authority & More
	Mar 9	1-4 PM	Agent's E&O: Defenses & Preventions for the Insurance Professional
	Mar 14	1-4 PM	The Bad Thing Happened: Handling Commercial Claims & Coverage Disputes
	Mar 16	1-4 PM	Employment Practices Liability - A Coverage No Business Can Afford to Be Without
	Mar 21	1-4 PM	Certificates of Insurance & the Coverage Issues that Go With Them
	Mar 22	2-3 PM	An Hour with Dave: Coverages That Keep a Business Income Loss From Bankrupting You
	Mar 23	9 AM-12 PM	Flood Insurance, FEMA, & the NFIP
	Mar 23	1-4 PM	Inflation & Personal Lines: Helping Insureds Understand Why It Matters & What to Do
	Mar 28	1-4 PM	Chris Amrhein's "Adventures in Aging": Medicare & Other Retirement Healthcare Solutions

 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





ANNUITIES CE ON-DEMAND COURSES


Producers with any type of annuity authority can meet Pennsylvania and Maryland's CE requirement with IA&B's on-demand courses: Annuity Best Interest Standards (1 CE) and Concepts & Uses of Annuities (4 CE) Perfect for busy insurance professionals. Access these and more 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

	Jan 12	1-4 PM	Agent's E&O: Defenses & Preventions for the Insurance Professional
	Feb 28	9 AM-12 PM	Agent's E&O: Duties, Best Practices, Operations, Workflows, & Certificates
	Mar 9	1-4 PM	Agent's E&O: Defenses & Preventions for the Insurance Professional

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

 PA|DE: 3 GEN | MD: 3 PC


 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


 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

 Feb 14-16 P&C Licensing Live Webinar

 Log into webinar: 7:30-7:55 AM
Webinar: 8:00 AM - 5:00 PM

 Live webinar: Member: \$299
Non-Member: \$419 *Members save \$120!*
Includes course materials & PLE fees

 24 Pre-Licensing Education Credits

GUARANTEE TO PASS

If you register for the Feb 14-16 course by Jan 13 and follow the provided study schedule, IA&B guarantees you will pass the exam. 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 \$42!*

➔ **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 \$64!*



SALES & MARKETING TRAINING

A fresh topic to update your CPIA designation. The three designation courses, Position for Success, Implement for Success and Sustain Success will be held in May. This training is developed by the American Insurance Marketing and Sales Society (AIMS).

Mar 14 Cyber Insurance Live Webinar

Log into webinar: 8:00 - 8:25 AM
Webinar: 8:30 AM - 4:30 PM

MEMBER: \$159 | NON-MEMBER: \$199
Members save \$30!
Includes course materials and CE fees.

PA/MD/DE: Submitted for 7 credits

NO EXAM REQUIRED

LOSS CONTROL CREDIT for Utica policyholders

LICENSING STUDY SCHOLARSHIPS AVAILABLE

IA&B offers scholarships for P&C licensing study courses in PA, MD, and DE. For more information and an application, go to IABforME.online/scholarships or contact Sarah Jacoby at 800-998-9644, ext. 104 or Sarahj@IABforME.com.

The IA&B Education Scholarship Program aims to develop new talent and support existing agency staff through insurance education.

THANK YOU PLATINUM PARTNERS FOR SUPPORTING THE INDEPENDENT AGENT NETWORK.



Great IA&B MEMBER BENEFITS

- 1** Legal & Compliance Resources
- 2** Classes & Online Training
- 3** Marketing, Branding & Websites
- 4** Political Advocacy
- 5** HR & Hiring Solutions
- 6** Insurance for Your Agency
- 7** Industry News
- 8** Access Markets & Carrier Relations



IA&B SAVES YOU TIME & MONEY

Only members can take advantage of these 8 great benefits. We help your agency thrive.

ANY QUESTIONS? CONTACT TIM WONDER, IA&B VP-MEMBERSHIP
717-918-9223 | TIMW@IABforME.COM



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LISTINGS

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.



**WOMEN'S
CONFERENCE**

Save the Date

First annual in-person conference celebrating growth and leadership for women in insurance.

When:

Wednesday, March 29, 2023
9:30 AM – 3:30 PM

Where:

The Inn at Leola Village
38 Deborah Dr, Leola, PA 17540
Lancaster County, PA
Women-Owned Business

Registration will open in January.