

EDUCATION

FOR INSURANCE SUPERHEROES

APRIL - JUNE 2023



QUICK

Quick! To our training schedule! Our education goal is simple: To give you the tools and knowledge 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, or on-demand course. IA&B offers courses for every learning style and schedule. 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





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.

	Apr 5	Personal Residential	Live Webinar
	Apr 12	Agency Operations	Live Webinar
	Apr 19	Commercial Casualty 1	Live Webinar
	Apr 25	Personal Auto	Linthicum Heights, MD
	Apr 26	Other Personal Lines Solutions	Lancaster, PA
	May 3	Commercial Property	Live Webinar
	May 10	Personal Residential	Newtown Square, PA
	May 17	Personal Auto	Live Webinar
	May 18	Agency Operations	Mechanicsburg, PA
	May 23	Commercial Property	Pittsburgh, PA
	May 24	Commercial Casualty 2	Live Webinar
	Jun 7	Life & Health Essentials	Live Webinar
	Jun 14	Other Personal Lines Solutions	Live Webinar
	Jun 21	Elements of Risk Management	Live Webinar
	Jun 27	Commercial Casualty I	Mechanicsburg, PA
	Jun 28	Personal Residential	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 (Recommended for those earning a designation.)

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.

	May 11	Personal 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/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.

	Apr 4-5	Life and Health	Live Webinar
	May 9-10	Agency Management	Live Webinar

Log into webinar: 7:30 - 7:55 AM
Webinar: 8:00 AM - 5:00 PM
Exam review: 5:15 - 5:30 PM 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.

	Jun 13-14	Live Webinar
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Log into webinar: 7:30 - 7:55 AM
Webinar: 8:00 AM - 5:15 PM

Member/Non-Member: \$450
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

	Apr 11	9 AM-12 PM	Commercial Property: Recent Changes and Crucial Concepts
	Apr 11	1-4 PM	Planting the Seed: Agent Strategies to Get and Keep Agribusiness Insureds
	Apr 12	9 AM-12 PM	Covering Online Fraud and Employees Who Turn Out to Be Crooks
	Apr 12	2-3 PM	An Hour with Cathy: Certificates of Insurance - Headaches & Remedies
	Apr 13	9 AM-12 PM	“Wait...What the #^&* Just Happened?!” Fourteen Personal Lines Issues To Know Before It’s Too Late
	Apr 13	1-4 PM	Agent’s E&O: Duties, Best Practices, Operations, Workflows, and Certificates
	Apr 18	9 AM-12 PM	Certificates and Additional Insureds: What Did I Do to Deserve This?!
	Apr 19	2-3 PM	An Hour with Nicole: Why Personal Lines Deductibles Always Confuse Insureds
	Apr 20	1-4 PM	Claims That Will Convince Your Insured to Enhance Their Homeowners Coverage
	Apr 25	9 AM-12 PM	Lurking: Surprises In the Contractor’s CGL Policy & Endorsements to Watch Out For
	Apr 25	1-4 PM	Why Good People Do Bad Things: A Deep Dive Into Agency Ethics
	Apr 26	2-3 PM	An Hour with Dave: Fast Facts About Flood
	Apr 27	9 AM-12 PM	Bots, Crypto, Weed and Other Risks You Never Imagined Insuring (But Here We Are)
	Apr 27	1-4 PM	Chris Amrhein’s “Adventures in Aging”: Social Security & Other Retirement Income Solutions
	May 9	9 AM-12 PM	Leadership and Liability: Insuring Executive Risk
	May 9	1-4 PM	Ethical Dilemmas in Insurance and the Responsibilities of Agents
	May 10	9 AM-12 PM	Cyber Coverage: Protecting Your Insureds From Hackers, Liars, & Really Bad Bots
	May 10	2-3 PM	An Hour with Cathy: Commercial Property Valuation Options (aka “How Big is the Check?”)
	May 11	9 AM-12 PM	Homeowners Deep-Dive: What You Need to Know About the Most Recent Forms
	May 11	1-4 PM	More Money, More (Insurance) Problems? Mastering P&C Coverage for the Affluent Market
	May 16	1-4 PM	Agent’s E&O: Defenses and Preventions for the Insurance Professional
	May 17	2-3 PM	An Hour with Nicole: Everything You Need to Know About Insuring Work-From-Home Exposures
	May 18	9 AM-12 PM	Inflation and Personal Lines: Helping Insureds Understand Why It Matters and What to Do
	May 18	1-4 PM	Chris Amrhein’s “Adventures in Aging”: Medicare and Other Retirement Healthcare Solutions
	May 23	9 AM-12 PM	Flood Insurance, FEMA, and the NFIP
	May 24	2-3 PM	An Hour with Sam: A Numbers Game - Mastering the Coverage Symbols in a Business Auto Policy
	May 25	9 AM-12 PM	Marriage, Kids, Money, Assisted Living and Everything Between: Home and Auto Exposures For Life
	Jun 6	1-4 PM	Mastering Business Income: Tools & Tips to Keep Insureds Flush
	Jun 7	9 AM-12 PM	Employment Practices Liability - A Coverage No Business Can Afford to Be Without
	Jun 7	2-3 PM	An Hour with Cathy: Certificates of Insurance - Headaches & Remedies
	Jun 15	9 AM-12 PM	Certificates and Additional Insureds: What Did I Do to Deserve This?!
	Jun 15	1-4 PM	“Wait...What the #^&* Just Happened?!” Fourteen Personal Lines Issues To Know Before It’s Too Late
	Jun 20	9 AM-12 PM	Commercial Property: Recent Changes and Crucial Concepts
	Jun 20	1-4 PM	The Bad Thing Happened: Handling Commercial Claims & Coverage Disputes
	Jun 21	2-3 PM	An Hour with Nicole: Why Personal Lines Deductibles Always Confuse Insureds
	Jun 22	9 AM-12 PM	Agent’s E&O: Duties, Best Practices, Operations, Workflows, and Certificates
	Jun 22	1-4 PM	Claims That Will Convince Your Insured to Enhance Their Homeowners Coverage
	Jun 27	9 AM-12 PM	All-Things Ethics: Agent Obligations, Standards, Authority and More
	Jun 27	1-4 PM	Chris Amrhein’s “Adventures in Aging”: Social Security & Other Retirement Income Solutions
	Jun 28	2-3 PM	An Hour with Dave: All-Things Ordinance or Law (Personal and Commercial)
	Jun 29	9 AM-12 PM	Growing Good Insurance: Property & Liability Endorsements to Fortify Farm Risks
	Jun 29	1-4 PM	Certificates of Insurance and the Coverage Issues that Go With Them



 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





E&O RISK MANAGEMENT
LIVE WEBINARS

	Apr 13	1-4 PM	Agent’s E&O: Duties, Best Practices, Operations, Workflows, & Certificates
	May 16	1-4 PM	Agent’s E&O: Defenses & Preventions for the Insurance Professional
	Jun 22	9 AM-12 PM	Agent’s E&O: Duties, Best Practices, Operations, Workflows, & Certificates

 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


ANNUITIES CE ON-DEMAND

Producers with any type of annuity authority can meet Pennsylvania’s 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

PA LICENSING STUDY COURSE

	Apr 18-20	P&C Licensing	Mechanicsburg, PA
	Jun 6-8	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 Live webinar: Member: \$299 Non-Member: \$419 Includes course materials & PLE fees. In-person classes include lunch.		

Members save \$120!

 24 Pre-Licensing Education Credits

GUARANTEE TO PASS
If you register by Mar 10 for the Apr 18-20 course or by May 5 for the Jun 6-8 course, 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.



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

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

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).

	May 2	Position for Success	Live Webinar
	May 3	Implement for Success	Live Webinar
	May 4	Sustain Success	Live Webinar

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

	MEMBER: \$159 NON-MEMBER: \$199 PER DAY
	Members save \$30!
	Includes course materials & CE fees

	Visit IABforME.com for details
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	NO EXAM REQUIRED
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	LOSS CONTROL CREDIT for Utica policyholders
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THANK YOU
PLATINUM
PARTNERS
FOR SUPPORTING
THE INDEPENDENT
AGENT NETWORK.



8 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 Market Access & Carrier Relations

Claire Pantaloni, CIC, CISR
Vice President, Advocacy

Don Bankus
Director
Legal & Corporate Affairs

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
IABFORME.COM/MEMBERSHIP



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• **INSIDE** •
APR • MAY • JUN
2023 COURSE
LISTINGS

IN-PERSON CLASSES

DETAILS FOR APR, MAY, & JUN CLASSES ARE LISTED INSIDE

Apr 18-20	P&C Licensing	Mechanicsburg, PA
Apr 25	CISR - Personal Auto	Linthicum Heights, MD
Apr 26	CISR - Other Personal Lines Solutions	Lancaster, PA
May 10	CISR - Personal Residential	Newtown Square, PA
May 18	CISR - Agency Operations	Mechanicsburg, PA
May 23	CISR - Commercial Property	Pittsburgh, PA
Jun 27	CISR - Commercial Casualty I	Mechanicsburg, PA

MARK YOUR CALENDARS!

Jul 11-12	CIC - Commercial Multiline	Mechanicsburg, PA
Jul 25-27	P&C Licensing	Mechanicsburg, PA
Aug 8-9	CIC - Ruble Graduate Seminar	Mechanicsburg, PA
Sep 12-13	CIC - Commercial Property	Lancaster, PA
Sep 28	CISR - Commercial Property	Lancaster, PA
Oct 3	CISR - Commercial Casualty II	Newtown Square, PA
Oct 4	William T Hold - Commercial Lines	Mechanicsburg, PA
Oct 17	CISR - Commercial Casualty I	Linthicum Heights, MD
Oct 17-18	Ruble Graduate Seminar	King of Prussia, PA
Oct 24-26	P&C Licensing	Mechanicsburg, PA
Nov 9	CISR - Elements of Risk Management	Mechanicsburg, PA
Nov 30	CISR - Agency Operations	Pittsburgh, PA
Dec 13	CISR - Personal Residential	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
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IA&B core hours of operation:
8:30 AM - 4:30 PM, Mon - Fri.