

# EDUCATION

## FOR INSURANCE SUPERHEROES

JULY - SEPTEMBER 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](http://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.

	Jul 12	Agency Operations	Live Webinar
	Jul 26	Commercial Casualty I	Live Webinar
	Aug 2	Commercial Property	Live Webinar
	Aug 9	Personal Auto	Live Webinar
	Aug 16	Commercial Casualty II	Live Webinar
	Aug 23	Life & Health Essentials	Live Webinar
	Aug 30	Other Personal Lines Solutions	Live Webinar
	Sep 20	Personal Residential	Live Webinar
	Sep 27	Elements of Risk Management	Live Webinar
	Sep 28	Commercial Property	Lancaster, PA

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.

	Jul 19	Commercial Lines	Live Webinar
	Sep 14	Personal Lines	Live Webinar

Log into webinar: 7:30 - 7:55 AM  
Webinar: 8:00 AM - 4:00 PM

Webinar: 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.

	Jul 11-12	Commercial Multiline	Live Webinar
	Jul 11-12	Commercial Multiline	Mechanicsburg, PA
	Sep 12-13	Commercial Property	Live Webinar
	Sep 12-13	Commercial Property	Lancaster, PA

Hybrid classes 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: 5:15 - 5:30 PM on first day  
(Recommended for those earning a designation.)

In-Person: Member/Non-Member: \$450  
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 introduced at the CIC course level.

	Aug 8-9	Live Webinar
	Aug 8-9	Mechanicsburg, 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: Member/Non-Member: \$450  
Webinar: 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

	Jul 10	1-4 PM	Marriage, Kids, Money, Assisted Living & Everything Between: Home & Auto Exposures for Life
	Jul 18	9 AM-12 PM	Personal & Commercial Lines Endorsements: Some Good, Some That Really Stink
	Jul 18	1-4 PM	Covering Online Fraud and Employees Who Turn out to be Crooks
	Jul 19	2-3 PM	An Hour with Sam: The Policy's Position on Home-Sharing and How to Handle It
	Jul 20	9 AM-12 PM	Lurking: Surprises In the Contractor's CGL Policy & Endorsements to Watch Out For
	Jul 20	1-4 PM	Chris Amrhein's "Adventure's in Aging": Medicare & Other Retirement Healthcare Solutions
	Jul 25	9 AM-12 PM	Agent's E&O: Defenses and Preventions for the Insurance Professional
	Jul 25	1-4 PM	Why Good People Do Bad Things: A Deep Dive Into Agency Ethics
	Jul 26	2-3 PM	An Hour with Nicole: Everything You Need to Know About Insuring Work-From-Home Exposures
	Jul 27	9 AM-12 PM	Inflation & Personal Lines: Helping Insureds Understand Why it Matters and What to Do
	Jul 31	1-4 PM	Flood Insurance, FEMA, and the NFIP
	Aug 2	9 AM-12 PM	Cyber Coverage: Protecting Your Insureds From Hackers, Liars, & Really Bad Bots
	Aug 2	2-3 PM	An Hour with Cathy: Commercial Property Valuation Options (aka "How Big is the Check?!")
	Aug 3	1-4 PM	Ethical Dilemmas in Insurance & the Responsibilities of Agents
	Aug 9	2-3 PM	An Hour with Nicole: Why Personal Lines Deductibles Always Confuse Insureds
	Aug 10	1-4 PM	Claims That Will Convince Your Insured to Enhance Their Homeowners Coverage
	Aug 15	9 AM-12 PM	Homeowners Deep-Dive: What You Need to Know About the Most Recent Forms
	Aug 15	1-4 PM	More Money, More (Insurance) Problems? Mastering P&C Coverage for the Affluent Market
	Aug 17	9 AM-12 PM	What the #^&* Just Happened? Fourteen Personal Lines Issues To Know Before It's Too Late
	Aug 17	1-4 PM	Chris Amrhein's "Adventure's in Aging": Social Security & Other Retirement Income Solutions
	Aug 22	9 AM-12 PM	Why Insurance to Value & Liability Limits are Always Wrong (and How to Fix That)
	Aug 22	1-4 PM	Mastering Business Income: Tools & Tips to Keep Insureds Flush
	Aug 23	2-3 PM	An Hour with Dave: Coverages That Keep a Business Income Loss From Bankrupting You
	Aug 24	9 AM-12 PM	Planting the Seed: Agent Strategies to Get & Keep Agribusiness Insureds
	Aug 24	1-4 PM	Agent's E&O: Duties, Best Practices, Operations, Workflows & Certificates
	Sep 13	9 AM-12 PM	Employment Practices Liability - A Coverage No Business Can Afford to Be Without
	Sep 14	9 AM-12 PM	Certificates of Insurance and the Coverage Issues that Go With Them
	Sep 18	1-4 PM	Commercial Property: Recent Changes and Crucial Concepts
	Sep 19	9 AM-12 PM	Agent's E&O: Defenses and Preventions for the Insurance Professional
	Sep 19	1-4 PM	Flood Insurance, FEMA, and the NFIP
	Sep 20	2-3 PM	An Hour with Nicole: Everything You Need to Know About Insuring Work-From-Home Exposures
	Sep 21	9 AM-12 PM	All-Things Ethics: Agents Obligations, Standards, Authority & More
	Sep 21	1-4 PM	The Bad Thing Happened: Handling Commercial Claims & Coverage Disputes
	Sep 25	1-4 PM	More Money, More (Insurance) Problems? Mastering P&C Coverage for the Affluent Market
	Sep 26	9 AM-12 PM	Marriage, Kids, Money, Assisted Living & Everything Between: Home & Auto Exposures for Life
	Sep 26	1-4 PM	Chris Amrhein's "Adventure's in Aging" :: Medicare & Other Retirement Healthcare Solutions
	Sep 27	2-3 PM	An Hour with Dave: Fast Facts About Flood



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


 CE details available on individual course information webpages.


 NO EXAM





E&O RISK MANAGEMENT  
LIVE WEBINARS

	Jul 25	9 AM-12 PM	Agent's E&O: Defenses & Preventions for the Insurance Professional
	Aug 24	1-4 PM	Agent's E&O: Duties, Best Practices, Operations, Workflows, & Certificates
	Sep 19	9 AM-12 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


 PASSING AN ONLINE EXAM IS REQUIRED TO EARN CE AND/OR LOSS CONTROL CREDITS


 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

	Jul 25-27	P&C Licensing	Mechanicsburg, PA
	Sep 19-21	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 *Members save \$120!*  
Includes course materials & PLE fees.  
In-person classes include lunch.

 24 Pre-Licensing Education Credits

**GUARANTEE TO PASS**  
If you register by Jun 23 for the Jul 25-27 course or by Aug 18 for the Sept 19-21 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

During this program, participants are encouraged to focus on factors effecting disaster and business continuity planning. Areas discussed include types of disasters, key planning elements, disaster team makeup, insurance considerations, and funding challenges. Participants will use case studies and exercises to practice concepts and techniques covered in the course.

### WHO SHOULD ATTEND?

This seminar is open to any employee of an agency, insurance company, or insurance-related business who wants to enhance sales techniques. It also satisfies the CPIA update requirement.

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



Sep 7 Disaster Planning and Business Continuity (an Advanced CPIA course) Live Webinar



Log into webinar: 7:30 - 7:55 AM  
Class: 8:00 AM - 4:45 PM



MEMBER: \$159 | NON-MEMBER: \$199  
Members save \$40!  
Includes course materials & CE fees



PA/DE: 8 GEN | MD: 8 PC



NO EXAM REQUIRED



LOSS CONTROL CREDIT for Utica policyholders

THANK YOU  
PLATINUM  
PARTNERS  
FOR SUPPORTING  
THE INDEPENDENT  
AGENT NETWORK.



## Great IA&B MEMBER BENEFITS

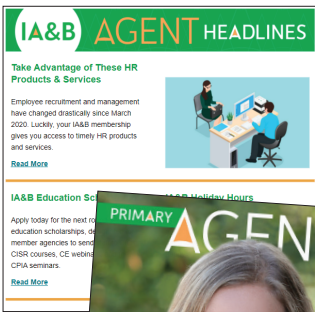
- 1 Legal & Compliance Resources
- 2 Classes & Online Training
- 3 Marketing, Branding & Websites
- 4 Political Advocacy
- 5 HR & Hiring Solutions
- 6 Insurance for Your Agency
- 7 Industry News
- 8 Market Access & Carrier Relations



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](mailto:TIMW@IABforME.COM)  
[IABFORME.COM/MEMBERSHIP](http://IABFORME.COM/MEMBERSHIP)



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• **INSIDE** •  
**JUL • AUG • SEP**  
**2023 COURSE**  
**LISTINGS**

## IN-PERSON CLASSES

**DETAILS FOR JUL, AUG, & SEP  
CLASSES ARE LISTED INSIDE**

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

### MARK YOUR CALENDARS!

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](http://IABforME.com)

## QUESTIONS?

Call 800-998-9644, option 2

Email: [education@IABforME.com](mailto: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.**