

# EDUCATION

## FOR INSURANCE SUPERHEROES

OCTOBER - DECEMBER 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.

	Oct 3	CISR Commercial Casualty II	Newtown Square, PA
	Oct 4	CISR-Agency Operations	Live Webinar
	Oct 11	CISR-Commercial Casualty I	Live Webinar
	Oct 17	CISR Commercial Casualty I	Linthicum Heights, MD
	Oct 18	CISR-Commercial Property	Live Webinar
	Oct 25	CISR-Personal Auto	Live Webinar
	Nov 8	CISR-Commercial Casualty II	Live Webinar
	Nov 9	CISR Elements of Risk Management	Mechanicsburg, PA
	Nov 15	CISR-Life & Health Essentials	Live Webinar
	Nov 30	CISR Agency Operations	Pittsburgh, PA
	Dec 6	CISR-Other Personal Lines Solutions	Live Webinar
	Dec 13	CISR Personal Residential	Mechanicsburg, PA
	Dec 13	CISR-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 (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.

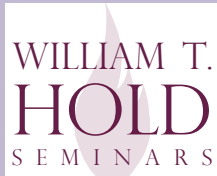


THE NATIONAL ALLIANCE AND IA&B

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.

	Oct 4	Commercial Lines	Mechanicsburg, PA
	Nov 29	Commercial Lines	Live Webinar

Arrival or log into webinar: 7:30 - 7:55 AM  
 In-person class or 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.

	Nov 7-8	Personal Lines	Live Webinar
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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.)

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.

	Oct 17-18	Live Webinar
	Oct 17-18	King of Prussia, PA

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.

Hybrid class held simultaneously online and in-person



OTHER COVERAGE LIVE CE WEBINARS

	Oct 5	9 AM-12 PM	Claims That Will Convince Your Insured to Enhance Their Homeowners Coverage
	Oct 5	1-4 PM	Covering Online Fraud and Employees Who Turn Out to be Crooks
	Oct 11	2-3 PM	An Hour with Sam: A Numbers Game - Mastering the Coverage Symbols in a Business Auto Policy
	Oct 12	1-4 PM	Bots, Crypto, Weed & Other Risks You Never Imagined Insuring (But Here We Are)
	Oct 17	1-4 PM	Lurking: Surprises In the Contractor's CGL Policy & Endorsements to Watch Out For
	Oct 19	1-4 PM	Chris Amrhein's "Adventures in Aging": Social Security & Other Retirement Income Solutions
	Oct 24	9 AM-12 PM	Wait, What the #^&* Just Happened? Fourteen Personal Lines Issues To Know Before It's Too Late
	Oct 24	1-4 PM	Why Good People Do Bad Things: A Deep Dive Into Agency Ethics
	Oct 25	2-3 PM	An Hour with Dave: All-Things Ordinance or Law (Personal and Commercial)
	Oct 26	9 AM-12 PM	Homeowners Deep-Dive: What You Need to Know About the Most Recent Forms
	Oct 26	1-4 PM	Agent's E&O: Duties, Best Practices, Operations, Workflows, & Certificates
	Oct 31	9 AM-12 PM	Growing Good Insurance: Property & Liability Endorsements to Fortify Farm Risks
	Nov 1	9 AM-12 PM	Flood Insurance, FEMA, and the NFIP
	Nov 1	2-3 PM	An Hour with Dave: Coverages That Keep a Business Income Loss From Bankrupting You
	Nov 2	9 AM-12 PM	Inflation & Personal Lines: Helping Insureds Understand Why it Matters and What to Do
	Nov 2	1-4 PM	Ethical Dilemmas in Insurance & the Responsibilities of Agents
	Nov 9	9 AM-12 PM	Marriage, Kids, Money, Assisted Living & Everything Between: Home & Auto Exposures for Life
	Nov 9	1-4 PM	Chris Amrhein's "Adventures in Aging": Medicare and Other Retirement Healthcare Solutions
	Nov 14	9 AM-12 PM	Commercial Property: Recent Changes and Crucial Concepts
	Nov 14	1-4 PM	Mastering Business Income: Tools & Tips to Keep Insureds Flush
	Nov 15	2-3 PM	An Hour with Nicole: Why Personal Lines Deductibles Always Confuse Insureds
	Nov 27	1-4 PM	More Money, More (Insurance) Problems? Mastering P&C Coverage for the Affluent Market
	Nov 28	1-4 PM	Cyber Coverage: Protecting Your Insureds From Hackers, Liars, & Really Bad Bots
	Nov 29	9 AM-12 PM	Leadership and Liability: Insuring Executive Risk
	Nov 29	2-3 PM	An Hour with Sam: The Policy's Position on Home-Sharing and How to Handle It
	Nov 30	1-4 PM	Agent's E&O: Defenses & Preventions for the Insurance Professional
	Dec 5	9 AM-12 PM	Homeowners Deep-Dive: What You Need to Know About the Most Recent Forms
	Dec 5	1-4 PM	Planting the Seed: Agent Strategies to Get & Keep Agribusiness Insureds
	Dec 6	2-3 PM	An Hour with Nicole: Everything You Need to Know About Insuring Work-From-Home Exposures
	Dec 7	9 AM-12 PM	Claims That Will Convince Your Insured to Enhance Their Homeowners Coverage
	Dec 7	1-4 PM	Wait, What the #^&* Just Happened? Fourteen Personal Lines Issues To Know Before It's Too Late
	Dec 12	9 AM-12 PM	Agent's E&O: Duties, Best Practices, Operations, Workflows, & Certificates
	Dec 12	1-4 PM	All-Things Ethics: Agents Obligations, Standards, Authority & More
	Dec 13	2-3 PM	An Hour with Dave: Fast Facts About Flood
	Dec 14	9 AM-12 PM	Certificates of Insurance and the Coverage Issues that Go With Them
	Dec 14	1-4 PM	Chris Amrhein's "Adventures in Aging": Social Security & Other Retirement Income Solutions



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



Oct 26 1-4 PM Agent's E&O: Duties, Best Practices, Operations, Workflows, & Certificates



Nov 30 1-4 PM Agent's E&O: Defenses & Preventions for the Insurance Professional

Dec 12 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



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



Oct 24-26 P&C Licensing Mechanicsburg, PA  
Dec 5-7 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  
In-person classes include lunch. Includes course materials & PLE fees. Shipping fees will be applied at time of registration.

*Members save \$120!*



24 Pre-Licensing Education Credits

**REGISTER NOW FOR THE GUARANTEE TO PASS**  
If you register by Sep 22 for the Oct 24-26 course or by Nov 3 for the Dec 5-7 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!*

IA&B

# YOUNG AGENT CONFERENCE

October 3-4, 2023  
Cork Factory | Lancaster, PA

Register by Fri, Sept. 22.  
Call 800-998-9644, option 1  
IABforME.online/YAconference

## Highlights

- ▲ Women's Breakfast
- ▲ Young Agent Award Lunch & Panel
- ▲ Happy Hour, Dinner & Networking

## Topics

- ▲ Be Unstoppable Workshop with Jimmy Page
- ▲ Thriving in the Hard Market with Bobbie Fernandez
- ▲ Prospecting with Greg Orth
- ▲ Niche Navigator with Bobbie Fernandez
- ▲ Chat GPT with Jason Walker

THANK YOU  
PLATINUM  
PARTNERS  
FOR SUPPORTING  
THE INDEPENDENT  
AGENT NETWORK.



## Great IA&B MEMBER BENEFITS

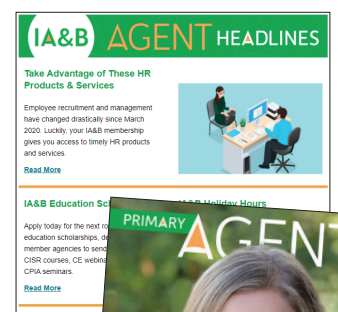
- 1 Legal & Compliance Resources
- 2 Classes & Online Training
- 3 Marketing, Branding & Websites
- 4 Political Advocacy
- 5 HR & Hiring Solutions
- 6 Insurance for Your Agency
- 7 Industry News
- 8 Market Access & Carrier Relations



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  
IABFORME.COM/MEMBERSHIP





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• **INSIDE** •  
**OCT • NOV • DEC**  
**2023 COURSE**  
**LISTINGS**

## IN-PERSON CLASSES THIS FALL

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)



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.