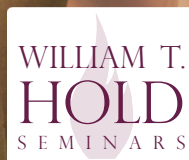




TRAINING SCHEDULE JANUARY - MARCH 2024

IA&B offers courses for every learning style & schedule. See inside for in-person, live webinar, and on-demand courses.



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



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.



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 10	CISR - Personal Residential	Live Webinar
	Jan 17	CISR - Agency Operations	Live Webinar
	Jan 24	CISR - Commercial Property	Live Webinar
	Jan 31	CISR - Commercial Casualty I	Live Webinar
	Feb 7	CISR - Personal Auto	Live Webinar
	Feb 14	CISR - Life & Health Essentials	Live Webinar
	Feb 22	CISR - Commercial Casualty II	Live Webinar
	Feb 28	CISR - Other Personal Lines Solutions	Live Webinar
	Feb 28	CISR - Commercial Property	Hunt Valley, MD
	Mar 6	CISR - Elements of Risk Management	Live Webinar
	Mar 13	CISR - Personal Residential	Live Webinar
	Mar 20	CISR - Other Personal Lines Solutions	Mechanicsburg, PA
	Mar 27	CISR - Agency Operations	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: \$170
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.



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 16-17	CIC - Agency Management	Live Webinar
	Feb 20-21	CIC - Commercial Casualty	Live Webinar
	Feb 20-21	CIC - Commercial Casualty	Pittsburgh, PA

Hybrid class held simultaneously online and 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: \$430
Includes course materials and CE fees

CE details available on individual course information webpages.

If earning a designation, a timed, two-hour online exam (essay/short answer) will be available Mon thru Thurs the week following your last day of the 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.

	Mar 12-13	Live Webinar
--	-----------	--------------

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

Webinar: Member/Non-Member: \$450
Includes course materials and CE fees


CE details available on individual course information webpages.


No Exam Required


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


OTHER COVERAGE LIVE CE WEBINARS

	Jan 9	11 AM-12 PM	An Hour with Cathy: Certificates of Insurance - Headaches and Remedies
	Jan 9	1-4 PM	Mastering Business Income: Tools & Tips to Keep Insureds Flush
	Jan 18	1-4 PM	All-Things Ethics: Agent Obligations, Standards, Authority and More *
	Jan 23	9 AM-12 PM	Bots, Crypto, Weed and Other Risks You Never Imagined Insuring (But Here We Are)
	Jan 25	9 AM-12 PM	Big Rig, Big Risk: Mastering Trucking Accounts
	Jan 25	1-4 PM	E&O: Duties, Laws, Documentation, and Data Breach **
	Jan 30	9 AM-12 PM	Claims That Will Convince Your Insured to Enhance Their Homeowners Coverage
	Jan 30	1-4 PM	Covering Online Fraud and Employees Who Turn Out to Be Crooks
	Feb 6	11 AM-12 PM	An Hour with Kevin: Using Small Motor Vehicles to Break Things & Hurt People
	Feb 6	1-4 PM	Bots, Crypto, Weed and Other Risks You Never Imagined Insuring (But Here We Are)
	Feb 15	1-4 PM	Ethical Dilemmas in Insurance and the Responsibilities of Agents *
	Feb 20	9 AM-12 PM	Marriage, Kids, Money, Assisted Living and Everything Between: Home and Auto Exposures For Life
	Feb 20	1-4 PM	Social Security and Medicare: Your Questions Answered
	Feb 21	2-3 PM	The STORM 2024 Edition: Commercial and Personal Lines Coverage Concerns in the Wake of a Big One
	Feb 22	9 AM-12 PM	Flood Insurance: What You Need to Know
	Feb 22	1-4 PM	The Bad Thing Happened: Handling Commercial Claims & Coverage Disputes
	Feb 27	9 AM-12 PM	E&O: Agent Obligations, Procedures, and Operations **
	Feb 27	1-4 PM	Inflation and Personal Lines: Helping Insureds Understand Why It Matters and What to Do
	Mar 5	11 AM-12 PM	An Hour with Dave: All-Things Ordinance or Law (Personal and Commercial)
	Mar 5	1-4 PM	All-Things Ethics: Agent Obligations, Standards, Authority and More *
	Mar 19	11 AM-12 PM	An Hour with Nicole: Everything You Need to Know About Insuring Work-From-Home Exposures
	Mar 19	1-4 PM	Claims That Will Convince Your Insured to Enhance Their Homeowners Coverage
	Mar 21	9 AM-12 PM	Forward and Backward: Insuring Emerging Risks, Surviving Deteriorating Markets
	Mar 21	1-4 PM	Cyber Coverage: Protecting Your Insureds From Hackers, Liars, & Really Bad Bots
	Mar 26	9 AM-12 PM	Commercial Property: Recent Changes and Crucial Concepts
	Mar 26	1-4 PM	Mastering Business Income: Tools & Tips to Keep Insureds Flush
	Mar 27	2-3 PM	An Hour with Dave: Coverages That Keep a Business Income Loss From Bankrupting You
	Mar 28	9 AM-12 PM	E&O: Duties, Laws, Documentation, and Data Breach **
	Mar 28	1-4 PM	Covering Online Fraud and Employees Who Turn Out to Be Crooks

 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 Required



 LOSS CONTROL CREDIT for: * Utica (PA, MD, DE);
** Utica (PA, MD, DE) and 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](https://iabforme.com)


E&O RISK MANAGEMENT
LIVE WEBINARS

	Jan 18	1-4 PM	All-Things Ethics: Agent Obligations, Standards, Authority and More *
	Jan 25	1-4 PM	E&O: Duties, Laws, Documentation, and Data Breach **
	Feb 15	1-4 PM	Ethical Dilemmas in Insurance and the Responsibilities of Agents *
	Feb 27	9 AM-12 PM	E&O: Agent Obligations, Procedures, and Operations **
	Mar 5	1-4 PM	All-Things Ethics: Agent Obligations, Standards, Authority and More *
	Mar 28	9 AM-12 PM	E&O: Duties, Laws, Documentation, and Data Breach **

 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);
** 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](https://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);
** Utica (PA, MD, DE) & SwissRe/Westport (PA, DE) policyholders

PA LICENSING STUDY COURSE

 Feb 6-8 P&C Licensing Live Webinar

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

 Live webinar: Member: \$329 +S&H | Non-Member: \$449 +S&H
Members save \$120!
Includes course materials & PLE fees.
Shipping fees will be applied at time of registration.

 24 Pre-Licensing Education Credits

REGISTER NOW FOR THE GUARANTEE TO PASS
If you register at least 4 weeks prior to course start date 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](https://iabforme.com)
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: \$249 +S&H | Non-Member: \$289 +S&H *Members save \$40!*
Shipping fees will be applied at time of registration.

**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

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.

During this program, participants are encouraged to focus on the exposures, insurance recommendations for coverage and risk management techniques used to identify, analyze, and control Cyber risks. This program will examine cyber threats of an organization. Having proper insurance along with implementing proper control and company policies can keep an organization from financial ruin.

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

COURSE OPEN TO **ANYONE** INTERESTED IN THIS TOPIC



Mar 19 An Agent's Guide to Understanding & Mitigating Cyber Exposures (an Advanced CPIA course) Live Webinar



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



MEMBER: \$189 | NON-MEMBER: \$229
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.



Interested in becoming a partner?
Reach out today.

Tim Wonder, IA&B VP-Membership
717-918-9223 | TimW@IABforME.com



8 GREAT MEMBER BENEFITS

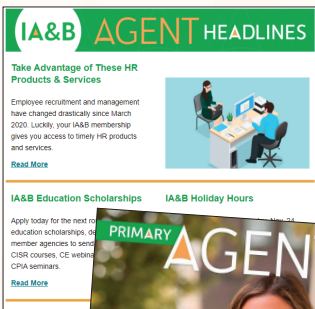
- 1 Legal & Compliance Resources
- 2 Classes & Online Training
- 3 Marketing Resources
- 4 Political Advocacy
- 5 HR & Hiring Solutions
- 6 Insurance for Your Agency
- 7 Industry News
- 8 Market Access & Carrier Relations



Claire Pantaloni, CIC, CISR
Vice President, Advocacy



Don Bankus
Director
Legal & Corporate Affairs



Only members can take advantage of these 8 great benefits.
We help independent insurance agencies thrive.

IF YOUR AGENCY IS NOT A MEMBER, JOIN NOW TO GET SUPPORT AND
RESOURCES IN 2024. CONTACT TIM WONDER, IA&B VP-MEMBERSHIP
717-918-9223 | TIMW@IABforME.COM
IABFORME.COM/MEMBERSHIP



Insurance Agents & Brokers
650 Wilson Lane, Suite 200
Mechanicsburg, PA 17055

STANDARD
US POSTAGE
PAID
Gettysburg, PA
Permit No. 28



IN-PERSON CLASSES APRIL - DEC 2024

Apr 17	CISR - Agency Operations	Lancaster, PA
Apr 23-25	P&C Licensing	Mechanicsburg, PA
May 7-8	CIC - Commercial Property	Mechanicsburg, PA
May 9	CISR - Personal Auto	Pittsburgh, PA
May 14	CISR - Commercial Casualty II	Mechanicsburg, PA
May 16	CISR - Personal Auto	Philadelphia, PA
Jun 11-12	Ruble Graduate Seminar	Mechanicsburg, PA
Jun 20	CISR - Personal Residential	Mechanicsburg, PA
Jul 23-25	P&C Licensing	Mechanicsburg, PA
Sep 17-18	CIC - Personal Lines	Lancaster, PA
Sep 26	CISR - Commercial Casualty I	Lancaster, PA
Oct 8-10	P&C Licensing	Mechanicsburg, PA
Oct 10	CISR - Commercial Property	Philadelphia, PA
Oct 15-16	Ruble Graduate Seminar	Philadelphia, PA
Oct 29	CISR - Commercial Casualty II	Hunt Valley, MD
Nov 7	CISR - Agency Operations	Mechanicsburg, PA
Nov 21	CISR - Commercial Casualty I	Pittsburgh, PA
Dec 10	CISR - Commercial Casualty I	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.