



IA&B

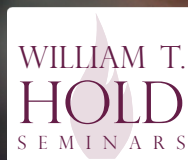
EDUCATION

ADVOCACY

RESOURCES

TRAINING SCHEDULE APRIL - JUNE 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](https://iabforme.com)



CERTIFIED INSURANCE SERVICE REPRESENTATIVE PROGRAM (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 3	CISR - Commercial Casualty I	Live Webinar
	Apr 10	CISR - Commercial Property	Live Webinar
	Apr 17	CISR - Agency Operations	Lancaster, PA
	Apr 18	CISR - Personal Auto	Live Webinar
	Apr 24	CISR - Commercial Casualty II	Live Webinar
	May 1	CISR - Life & Health Essentials	Live Webinar
	May 8	CISR - Elements of Risk Management	Live Webinar
	May 9	CISR - Personal Auto	Cranberry Twp, PA
	May 14	CISR - Commercial Casualty II	Mechanicsburg, PA
	May 15	CISR - Other Personal Lines Solutions	Live Webinar
	May 16	CISR - Personal Auto	Phoenixville, PA
	May 22	CISR - Personal Residential	Live Webinar
	Jun 5	CISR - Agency Operations	Live Webinar
	Jun 12	CISR - Commercial Casualty I	Live Webinar
	Jun 20	CISR - Personal Residential	Mechanicsburg, PA
	Jun 25	CISR - Commercial Property	Live Webinar
	Jun 26	CISR - Personal Auto	Live Webinar

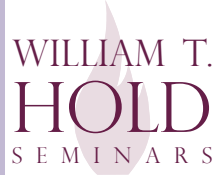
Arrival or log into webinar: 7:30 - 7:55 AM
In-person class or webinar: 8:00 AM - 3:45 PM
Exam Review: 3:45 - 4:15 PM (Recommended for those earning a designation.)

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.



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.

	Apr 4	Commercial Lines	Live Webinar
	May 2	Personal Lines	Live Webinar

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

Webinar: Member/Non-Member: \$170
Includes course materials and CE fees

CE details available on individual course information webpages.

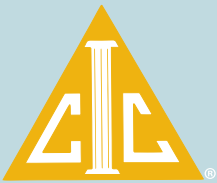
NO EXAM

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

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



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 9-10	CIC - Life and Health	Live Webinar
	May 7-8	CIC - Commercial Property	Live Webinar
	May 7-8	CIC - Commercial Property	Mechanicsburg, 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.

	Jun 11-12	Live Webinar
	Jun 11-12	Mechanicsburg, 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 - 5:15 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 Required


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


OTHER COVERAGE LIVE CE WEBINARS

	Apr 9	11 AM-12 PM	An Hour with Cathy: Commercial Property Valuation Options (aka “How Big is the Check?!”)
	Apr 9	1-4 PM	Ethical Dilemmas in Insurance and the Responsibilities of Agents *
	Apr 11	11 AM-12 PM	An Hour with Kevin: Using Small Motor Vehicles to Break Things & Hurt People
	Apr 11	1-4 PM	The Fine Print: Understanding the Contractual Obligations of Your Insured
	Apr 16	9 AM-12 PM	Insuring Vehicles, Equipment and Other Stuff That Moves - Personal & Commercial Lines
	Apr 16	1-4 PM	Inflation & Personal Lines: Helping Insureds Understand Why it Matters and What to Do
	Apr 23	9 AM-12 PM	“Wait...What the #^&* Just Happened?” Fourteen Personal Lines Issues to Know Before It’s Too Late
	Apr 23	1-4 PM	E&O: Agent Obligations, Procedures, and Operations **
	Apr 25	9 AM-12 PM	Stinkin Rich, Insurance Poor: P&C Coverage Challenges for High-Net-Worth Individuals
	Apr 25	1-4 PM	Social Security and Medicare: Your Questions Answered
	May 2	1-4 PM	Certificates, Contractors, and You: Fights, Coverage Issues, Best Practices
	May 9	11 AM-12 PM	An Hour with Sam: Physical Damage Coverage Concerns in the Personal Auto Policy
	May 9	1-4 PM	All-Things Ethics: Agent Obligations, Standards, Authority and More
	May 14	11 AM-12 PM	An Hour with Nicole: Why Personal Lines Deductibles Always Confuse Insureds
	May 14	1-4 PM	Claims That Will Convince Your Insured to Enhance Their Homeowners Coverage
	May 16	9 AM-12 PM	Homeowners Deep-Dive: What You Need to Know About the Most Recent Forms
	May 16	1-4 PM	Cyber Coverage: Protecting Your Insureds From Hackers, Liars, & Really Bad Bots
	May 21	9 AM-12 PM	E&O: Duties, Laws, Documentation, and Data Breach **
	May 21	1-4 PM	The Bad Thing Happened: Handling Commercial Claims & Coverage Disputes
	May 23	9 AM-12 PM	Transportation Insurance: A Non-Standard Business Exposure
	May 23	1-4 PM	Social Security and Medicare: Your Questions Answered
	Jun 6	11 AM-12 PM	An Hour with Sam: Liability Concerns in the Personal Auto Policy
	Jun 6	1-4 PM	Mastering Business Income: Tools & Tips to Keep Insureds Flush
	Jun 13	9 AM-12 PM	Bots, Crypto, Weed and Other Risks You Never Imagined Insuring (But Here We Are)
	Jun 13	1-4 PM	E&O: Agent Obligations, Procedures, and Operations **
	Jun 18	11 AM-12 PM	An Hour with Cathy: Certificates of Insurance - Headaches and Remedies
	Jun 18	1-4 PM	Ethical Dilemmas in Insurance and the Responsibilities of Agents *
	Jun 20	9 AM-12 PM	How It’s Built, How It’s Used, Will It Survive: Elements of Property Underwriting
	Jun 20	1-4 PM	Covering Online Fraud and Employees Who Turn Out to Be Crooks
	Jun 25	9 AM-12 PM	Flood Insurance: What You Need to Know
	Jun 25	1-4 PM	Inflation & Personal Lines: Helping Insureds Understand Why it Matters and What to Do
	Jun 26	2-3 PM	An Hour with Dave: All-Things Ordinance or Law (Personal and Commercial)
	Jun 27	9 AM-12 PM	Why Inadequate EPLI Will Close Your Business (and What to Do About It)

 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

	Apr 9	1-4 PM	Ethical Dilemmas in Insurance and the Responsibilities of Agents *
	Apr 23	1-4 PM	E&O: Agent Obligations, Procedures, and Operations **
	May 21	9 AM-12 PM	E&O: Duties, Laws, Documentation, and Data Breach **
	Jun 13	1-4 PM	E&O: Agent Obligations, Procedures, and Operations **
	Jun 18	1-4 PM	Ethical Dilemmas in Insurance and the Responsibilities of Agents *

 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

 Apr 23-25 P&C Licensing Mechanicsburg, PA
Jun 4-6 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 \$429 | Non-Member: \$549
Live webinar: Member: \$329 | Non-Member: \$449
Includes course materials & PLE fees.
In-person classes include lunch.

Members save \$120!

 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

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!

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 *Success* courses and you'll earn the Certified Professional Insurance Agent (CPIA). There is no exam for this certification.

ADVANCED COURSE - DISASTER PLANNING

COURSE OPEN TO ANYONE INTERESTED IN THIS TOPIC

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.

These trainings were developed by the American Insurance Marketing and Sales Society (AIMS).



May 14	CPIA - Position for Success	Live Webinar
May 15	CPIA - Implement for Success	Live Webinar
May 16	CPIA - Sustain Success	Live Webinar
Jun 18	Advanced CPIA - Disaster Planning & Business Continuity - <i>Course open to anyone interested in this topic</i>	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



CE details available on individual course information webpages.



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

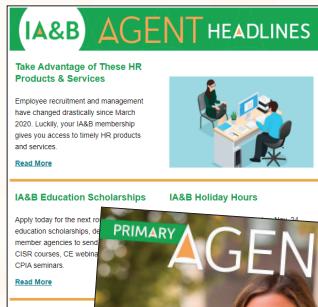
- 1 Legal & Compliance Resources
- 2 Classes & Online Training
- 3 Marketing Resources
- 4 Political Advocacy
- 5 HR & Hiring Solutions
- 6 Insurance for Your Agency
- 7 Industry News
- 8 Market Access & Carrier Relations



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. CONTACT TIM WONDER, IA&B VP-MEMBERSHIP
717-918-9223 | TIMW@IABforME.COM
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Mechanicsburg, PA 17055

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INSIDE
APR • MAY • JUN
2024 COURSE
LISTINGS

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	Cranberry Township, PA
May 14	CISR - Commercial Casualty II	Mechanicsburg, PA
May 16	CISR - Personal Auto	Phoenixville, 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	Newtown Square, PA
Oct 15-16	Ruble Graduate Seminar	Phoenixville, 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.

*Featured on the Cover: Nikki Hart, Personal Lines Underwriter
Member Agency: The Farmers Fire Insurance Company*