



Professional Training Schedule

JULY TO SEPTEMBER 2025

Courses for every learning style & schedule... in-person, live webinar, and on-demand.

REGISTER NOW ▲ 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.

	Jul 9	CISR-Other Personal Lines	Live Webinar
	Jul 16	CISR-Commercial Casualty I	Live Webinar
	Jul 23	CISR-Life & Health Essentials	Live Webinar
	Jul 30	CISR-Personal Residential	Live Webinar
	Aug 6	CISR-Elements of Risk Management	Live Webinar
	Aug 6	CISR-Agency Operations	Live Webinar
	Aug 13	CISR-Commercial Property	Live Webinar
	Aug 27	CISR-Personal Auto	Live Webinar
	Sep 10	CISR-Commercial Casualty II	Live Webinar
	Sep 17	CISR-Other Personal Lines	Live Webinar
	Sep 18	CISR Personal Auto	Lancaster, PA
	Sep 24	CISR-Commercial Casualty I	Live Webinar

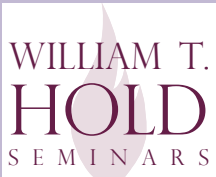
Arrival or log into webinar: 7:30 - 7:55 AM
In-person class or webinar: 8:00 AM - 3:45 PM
Exam Review: 3:45 - 4:15 PM (Recommended for those earning a designation.)

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.

	Jul 17	Commercial Lines	Live Webinar
	Sep 30	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.

RISK & INSURANCE EDUCATION ALLIANCE AND IA&B

IA&B brings you the popular educational programs developed by the Risk & Insurance Education Alliance (also referred to as the Alliance):

- 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

Take five CIC courses of your choice and pass the corresponding exams within five calendar years. 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 15-16	CIC-Commercial Casualty	Live Webinar
	Sep 2-3	CIC Life and Health	Erie, PA
	Sep 16-17	CIC Commercial Multiline	Live Webinar *
	Sep 16-17	CIC-Commercial Multiline	Lancaster, 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 *Includes course materials and CE fees*
Webinar: Member/Non-Member: \$430

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.

The educational programs and research conducted by the 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.



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.

The full agenda and topics is available on the individual course information webpages.

	Jul 29-30	Erie, PA
	Aug 19-20	Live Webinar

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: \$460
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


	Jul 8	9 AM-12 PM	Bad Machines, Evil People: The Latest in Cyber
	Jul 8	1-4 PM	Ethics in Insurance - Protecting the Client and the Agency *
	Jul 9	1-4 PM	The Fine Print: Understanding the Contractual Obligations of Your Insured
	Jul 10	9 AM-12 PM	Homeowners Endorsements Insureds Don't Want (But Do Need)
	Jul 10	2-3 PM	An Hour with Nicole: Making Sense of Homeowners Deductibles (Once and For All!)
	Jul 15	9 AM-12 PM	Certificates, Contractors, and You: Fights, Coverage Issues, Best Practices
	Jul 15	1-4 PM	Reasons Personal Lines are Broken (and What to Do About It)
	Jul 17	11 AM-12 PM	An Hour with Patrick: Reinsurance: How It Works & Why It Matters
	Jul 17	1-4 PM	Understanding Commercial Property Gaps and Knowing How to Fill Them **
	Jul 22	1-4 PM	Liar!: An Agent's Role in Identifying & Handling Fraud
	Jul 29	9-11 AM	Just Use Mine: Home, Vehicle and Other Sharing Exposures Insurance Doesn't Like
	Jul 29	1-4 PM	Dawn of New Age or End of the World? Emerging Risks That Make You Wonder
	Jul 30	2-3 PM	An Hour with Dave: E&O: Talking Exposures with an Attorney
	Jul 31	9 AM-12 PM	Forward and Backward: Insuring Emerging Risks, Surviving Deteriorating Markets
	Aug 5	1-4 PM	Ethics, Diligence, Success: What Agencies Need to Know *
	Aug 6	2-3 PM	An Hour with Dave: Understanding Ordinance or Law (Because Insureds Still Don't)
	Aug 7	9 AM-12 PM	Flood Insurance: What You Need to Know
	Aug 7	1-4 PM	Coverage Essentials: Homeowners Part 1–Policy Definitions, Liability Coverage & Policy Conditions **
	Aug 12	1-4 PM	Commercial Property: Claims, Coverages, Consequences
	Aug 19	9-11 AM	CGL Endorsements That Will Break Your Policy
	Aug 19	2-3 PM	An Hour with Cathy: I Pay What? How Commercial Policy Deductibles Work
	Aug 21	9 AM-12 PM	Why Inadequate EPLI Will Close Your Business (and What to Do About It)
	Aug 21	1-4 PM	Stinkin Rich, Insurance Poor: P&C Coverage Challenges for High-Net-Worth Individuals
	Aug 26	9-11 AM	Why Are You Here?! Insurance Issues with the People and Stuff in Your House
	Aug 26	1-4 PM	Social Security and Medicare: Your Questions Answered
	Aug 27	1-4 PM	Transportation Insurance: A Non-Standard Business Exposure
	Aug 28	9-11 AM	Eroding: The Personal Lines Implosion and What Happens Next
	Aug 28	2-3 PM	An Hour with Nicole: Personal Lines: Read the %^&* Form!
	Sep 9	11 AM-12 PM	An Hour with Patrick: Reinsurance: How It Works & Why It Matters
	Sep 9	1-4 PM	Understanding Commercial Property Gaps and Knowing How to Fill Them **
	Sep 10	9-11 AM	Homeowners Endorsements Insureds Don't Want (But Do Need)
	Sep 10	2-3 PM	An Hour with Nicole: Making Sense of Homeowners Deductibles (Once and For All!)
	Sep 11	2-3 PM	An Hour with Cathy: Understanding (Finally!) How Claims Made Policies Work
	Sep 16	1-4 PM	Reasons Personal Lines are Broken (and What to Do About It)
	Sep 17	2-3 PM	An Hour with Dave: What Everyone Must Know About Flood
	Sep 18	9-11 AM	Name That Endorsement: Business Auto and Commercial Property Edition
	Sep 18	1-4 PM	Ethics in Insurance - Protecting the Client and the Agency *
	Sep 25	1-4 PM	Bad Machines, Evil People: The Latest in Cyber
	Sep 30	9 AM-12 PM	Liar!: An Agent's Role in Identifying & Handling Fraud




CONTINUED: OTHER COVERAGE




1 HOUR WEBINARS: Member: \$25 | Non-Member: \$55 *Members save \$30!*
2 HOUR WEBINARS: Member: \$50 | Non-Member: \$80 *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 Swiss Re/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.online/OnDemand)

E&O RISK MANAGEMENT LIVE WEBINARS



Jul 81-4 PMEthics in Insurance - Protecting the Client and the Agency *



Jul 171-4 PMAUnderstanding Commercial Property Gaps and Knowing How to Fill Them **

Aug 51-4 PMAEthics, Diligence, Success: What Agencies Need to Know *

Aug 71-4 PMACoverage Essentials: Homeowners Part 1 – Policy Definitions, Liability Coverage & Policy Conditions **

Sep 91-4 PMAUnderstanding Commercial Property Gaps and Knowing How to Fill Them **

Sep 181-4 PMAEthics in Insurance - Protecting the Client and the Agency *



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) & Swiss Re (PA, DE) policyholders


PA ETHICS & FLOOD CREDITS

Recently enacted legislation, which took effect on April 29, 2025 triggered these new requirements:

- The Flood requirement (2 hours) applies to all resident producers with Property, Casualty, or Personal lines of authority.
- The Ethics requirement (3 hours) applies to all resident producers and both resident and non-resident Title agents.



Jul 81-4 PMAEthics in Insurance - Protecting the Client and the Agency *




Aug 51-4 PMAEthics, Diligence, Success: What Agencies Need to Know *


Aug 79 AM-12 PMFlood Insurance: What You Need to Know

Sep 172-3 PMAn Hour with Dave: What Everyone Must Know About Flood


Sep 181-4 PMAEthics in Insurance - Protecting the Client and the Agency *




1 HOUR WEBINAR: Member: \$25 | Non-Member: \$55
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)

IA&B IS YOUR PREMIER RESOURCE FOR LICENSING EXAM PREPARATION

IA&B can help you prepare and study to earn a Property & Casualty and Life & Health license in Pennsylvania, Maryland, and Delaware. Our study and preparation methods have a proven track record of helping people feel confident and ready to pass the state licensing exams.

Check out
[IABforME.online/licensing](https://iabforME.online/licensing)



MARK YOUR CALENDARS FOR OUR 2025 IN-PERSON CLASSES

Jul 29-30	Ruble Graduate Seminar	Erie, PA
Sep 2-3	CIC - Life and Health	Erie, PA
Sep 16-17	CIC - Commercial Multiline	Lancaster, PA
Sep 18	CISR - Personal Auto	Lancaster, PA
Oct 7-8	Ruble Graduate Seminar	Philadelphia, PA
Oct 15	CISR - Commercial Casualty I	Philadelphia, PA
Oct 28	CISR - Commercial Casualty II	Frederick, MD
Nov 6	CISR - Commercial Property	Pittsburgh, PA
Nov 18	CISR - Commercial Casualty I	Mechanicsburg, PA
Nov 18-19	CIC - Personal Lines	Erie, PA
Dec 2	CISR - Other Personal Lines	Mechanicsburg, PA

INTRODUCING INSURING CAREERS CERTIFICATION PROGRAM

Do you have a new, unlicensed employee?

Is your new employee starting a career in insurance? Let IA&B help you with preparing them for the licensing exam and building a practical knowledge of insurance operations.

Insuring Careers Certification Program (ICCP) is the perfect program for newcomers to the insurance industry. It is designed for new employees who are starting a career in property and casualty insurance in PA, MD, and DE. This program breaks down the complex world of insurance into manageable learning segments. Your employees will prepare for the licensing exam and develop a practical knowledge base. ICCP provides your employees with the necessary tools and knowledge for success.

How does this certification program work?

- ▲ It's online & flexible.
- ▲ Your employees have up to six months to complete the program, but it can be completed sooner.
- ▲ Your employees have access to an experienced education team that can answer questions and provide support.

*"This is a great program!
It's benefiting our agency
and the material is easy to
understand for our staff."*

Robert Smyrl, CIC
President, Smyrl Insurance

Register new employees in the Insuring Careers Certification Program (ICCP)



For more information and to get started, contact:
Heather Ulrich, IA&B Director of Career Services
717-918-9441 | HeatherU@IABforME.com
IABforME.com





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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

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QUESTIONS?

Call: 800-998-9644, option 2

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Featured on the Cover: Royden Pearson and Melissa Bruder of
America Insurance Agency in Newtown, PA.