

IA&B

EDUCATION

ADVOCACY

RESOURCES

Professional Training Schedule

2026

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

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NEW YEAR NEW GOAL

Earn a Designation.

CISR
CISR Elite
CIC
CPIA

Deepen your insurance knowledge, boost your confidence, and advance your career by earning a designation.

WHAT SETS IA&B APART...

- ▲ Award-Winning Education
- ▲ Expert Trainers
- ▲ Easy-to-Follow Course Materials
- ▲ Best. Staff. Ever.



IA&B brings you these 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

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.



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 CISR 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.

EARN A CISR ELITE DESIGNATION

If you take and pass all nine courses, you will earn the CISR Elite designation. After earning the CISR or the CISR Elite Designation, you are eligible to attend special programs designed exclusively for CISR designees.



Arrival or log into Live Webinar: 7:30 - 7:55 AM
In-person class or Live 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
Live Webinar: Member/Non-Member: \$175
Includes course materials and CE fees. In-person classes include lunch.



CE details available on individual course information webpages.

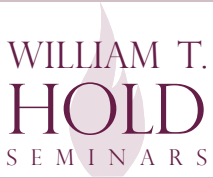


If earning a designation, a timed, one-hour online exam will be available after 4:15 PM the day of class through Thursday of the week following your in-person class or live webinar.



LOSS CONTROL CREDIT for Utica policyholders with CIC, CRM, or CISR designations *except* Agency Operations, which credits any Utica policyholder.

Jan 14	Personal Residential	Live Webinar
Jan 21	Agency Operations	Live Webinar
Jan 28	Elements of Risk Management	Live Webinar
Feb 4	Commercial Property	Live Webinar
Feb 11	Personal Auto	Live Webinar
Feb 18	Commercial Casualty 2	Live Webinar
Feb 25	Other Personal Lines	Live Webinar
Mar 4	Commercial Casualty 1	Live Webinar
Mar 11	Personal Residential	Live Webinar
Mar 18	Agency Operations	Live Webinar
Mar 18	Elements of Risk Management	Mechanicsburg, PA
Mar 25	Commercial Property	Live Webinar
Apr 1	Elements of Risk Management	Live Webinar
Apr 8	Other Personal Lines	Pittsburgh, PA
Apr 16	Other Personal Lines	Mechanicsburg, PA
Apr 22	Personal Auto	Live Webinar
Apr 23	Life & Health Essentials	Live Webinar
Apr 29	Commercial Casualty 2	Live Webinar
Apr 30	Personal Residential	Lancaster, PA
May 12	Commercial Casualty 2	Philadelphia, PA
May 13	Other Personal Lines	Live Webinar
May 21	Personal Auto	Mechanicsburg, PA
Jun 3	Commercial Casualty 1	Live Webinar
Jun 11	Commercial Casualty 2	Mechanicsburg, PA
Jun 17	Personal Residential	Live Webinar
Jun 24	Agency Operations	Live Webinar
Jul 15	Commercial Property	Live Webinar
Jul 28	Elements of Risk Management	Live Webinar
Aug 5	Personal Auto	Live Webinar
Aug 6	Commercial Property	Mechanicsburg, PA
Aug 12	Commercial Casualty 2	Live Webinar
Aug 19	Other Personal Lines	Live Webinar
Aug 26	Commercial Casualty 1	Live Webinar
Sep 2	Life & Health Essentials	Live Webinar
Sep 17	Agency Operations	Mechanicsburg, PA
Sep 23	Elements of Risk Management	Lancaster, PA
Sep 23	Personal Residential	Live Webinar
Oct 7	Agency Operations	Live Webinar
Oct 14	Commercial Property	Live Webinar
Oct 21	Elements of Risk Management	Live Webinar
Oct 22	Agency Operations	Philadelphia, PA
Oct 22	Commercial Casualty 1	Mechanicsburg, PA
Oct 28	Personal Auto	Live Webinar
Nov 4	Commercial Casualty 2	Live Webinar
Nov 11	Commercial Casualty 1	Live Webinar
Nov 12	Commercial Casualty 2	Pittsburgh, PA
Nov 17	Other Personal Lines	Live Webinar
Dec 3	Personal Residential	Mechanicsburg, PA



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.

SEMINAR TOPIC DESCRIPTIONS

Personal Lines - Personal Auto and Homeowners Policies, Personal Umbrella/Excess Policies, and the NFIP.

Commercial Lines - Occurrence and Claims-Made Coverage Triggers, Professional and Management Liability, and Coverage Review of Employment Practices Liability and Cyber.



Apr 28	Commercial Lines	Live Webinar
May 12	Personal Lines	Live Webinar
Jul 29	Commercial Lines	Live Webinar
Sep 30	Personal Lines	Live Webinar
Dec 2	Commercial Lines	Live Webinar



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



Live Webinar: Member/Non-Member: \$175
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.

E&O RISK MANAGEMENT LIVE WEBINARS

Protect yourself and your agency from E&O claims by understanding how and why agents are sued. Find out what you can do to minimize exposures as you implement loss-control protocols within your agency.



Jan 15 9 AM-12 PM Ethics in Insurance - Protecting the Client and the Agency *



Jan 15 1-4 PM Understanding Commercial Property Gaps and Knowing How to Fill Them **

Feb 10 1-4 PM Ethics, Diligence, Success: What Agencies Need to Know *

Feb 24 9 AM-12 PM Coverage Essentials: Homeowners Part 1 – Policy Definitions, Liability Coverage and Policy Conditions **

Mar 24 9 AM-12 PM Understanding Commercial Property Gaps and Knowing How to Fill Them **

Mar 24 1-4 PM Ethics 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



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 with two years of experience
- 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.



Arrival or log into Live Webinar: 7:30 - 7:55 AM
In-person class or Live Webinar: 8:00 AM - 5:00 PM
Exam review: 5:15 - 5:30 PM on first day
(Recommended for those earning the designation.)



In-Person: Member/Non-Member: \$465
Live Webinar: Member/Non-Member: \$435
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 live webinar.



LOSS CONTROL CREDIT for Utica policyholders with CIC, CRM, or CISR designations *except* Agency Management, which credits any Utica policyholder.

Feb 3-4	Personal Lines	Pittsburgh, PA or Live Webinar
Feb 10-11	Insurance Company Operations	Erie, PA
Apr 7-8	Commercial Property	Live Webinar
May 12-13	Commercial Casualty	Erie, PA
May 12-13	Commercial Multiline	Mechanicsburg, PA or Live Webinar
Jul 14-15	Agency Management	Live Webinar
Sep 15-16	Commercial Casualty	Lancaster, PA or Live Webinar
Sep 22-23	Agency Management	Erie, PA
Nov 11-12	Insurance Company Operations	Live Webinar
Nov 17-18	Personal Lines	Erie, PA



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. You must be a dues-paid member of the Alliance to attend and earn update credit.

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



Arrival or log into Live Webinar: 7:30 - 7:55 AM
In-person class or Live Webinar: 8:00 AM - 5:15 PM



In-Person: Member/Non-Member: \$460
Live 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.

Mar 10-11	Live Webinar
Jun 9-10	Mechanicsburg, PA or Live Webinar
Jul 21-22	Erie, PA
Aug 18-19	Live Webinar
Oct 6-7	Philadelphia, PA or Live Webinar

ETHICS & FLOOD CREDITS



In PA, legislations enacted 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.



Jan 15 9AM-12PM Ethics in Insurance - Protecting the Client and the Agency *



Jan 20 9-11AM Murky: Understanding Flood Coverage, Rules, and Claims

Feb 5 9AM-12PM Flood: 3-Hour NFIP Training and the Latest Happenings

Feb 10 1-4 PM Ethics, Diligence, Success: What Agencies Need to Know *

Mar 10 9-11AM Murky: Understanding Flood Coverage, Rules, and Claims

Mar 24 1-4 PM Ethics in Insurance - Protecting the Client and the Agency *



1 HOUR LIVE WEBINAR: Member: \$25 | Non-Member: \$55
2 HOUR LIVE WEBINARS: Member: \$50 | Non-Member: \$80
3 HOUR LIVE 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) policyholders

Visit our website for more 2026 course dates.

LICENSING STUDY OPTIONS

PA: IN-PERSON OR LIVE WEBINARS

Our study and preparation methods have a proven track record of helping people feel confident and ready to pass the state licensing exams.



Jan 13-15	P&C Licensing	Live Webinar
Feb 24-26	P&C Licensing	Mechanicsburg, PA
Mar 10-12	P&C Licensing	Live Webinar
Apr 7-9	P&C Licensing	Mechanicsburg, PA
May 19-21	P&C Licensing	Live Webinar
Jun 16-18	P&C Licensing	Mechanicsburg, PA



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 +S&H | Non-Member: \$549 +S&H
Live webinar: Member: \$329 +S&H | Non-Member: \$449 +S&H
Members save \$120!
Includes course materials. In-person classes include lunch.

Visit our website for additional course offerings!

LICENSING SELF STUDY

PA 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!*
Shipping fees will be applied at time of registration.

P&C: MD, DE
LIFE & HEALTH: PA, 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 On-Demand Videos and access to the Interactive Learning Portal.

LIVE ONLINE STUDY: This package includes all of the Video Study Package plus live instructor-led training sessions.

See IABforME.com/education-events/licensing for pricing. Members get 20% discount.

Check out ICCP - the licensing and insurance training program for new employees on page 11.



LIVE CE
WEBINARS

Over 15 new topics
have been added



1 HOUR LIVE WEBINARS:
Member: \$25
Non-Member: \$55
Members save \$30!

2 HOUR LIVE WEBINARS:
Member: \$50
Non-Member: \$80
Members save \$30!

3 HOUR LIVE 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

*** Follows 3-hour curriculum from NFIP for agents selling flood

Check the web for additional
dates and topics!

Jan 13	9-11 AM	Eroding: The Personal Lines Implosion and What Happens Next
Jan 13	2-3 PM	An Hour with Nicole: Making Sense of Homeowners Deductibles (Once and For All!)
Jan 14	11 AM-12 PM	Commercial Lines Issues After a Huge Storm
Jan 15	9 AM-12 PM	Ethics in Insurance - Protecting the Client and the Agency *
Jan 15	1-4 PM	Understanding Commercial Property Gaps and Knowing How to Fill Them **
Jan 20	9-11 AM	Murky: Understanding Flood Coverage, Rules, and Claims
Jan 20	1-4 PM	Reasons Personal Lines are Broken (and What to Do About It)
Jan 21	11 AM-12 PM	Personal Lines Issues After a Huge Storm
Jan 22	9 AM-12 PM	Dawn of New Age or End of the World? Emerging Risks That Make You Wonder
Jan 22	1-3 PM	CGL Endorsements That Will Break Your Policy
Jan 27	9 AM-12 PM	Recognizing Fraudulent Claims and the Insureds Who File Them
Jan 27	1-4 PM	Retirement Healthcare Solutions – Medicare and Others
Jan 29	9-11 AM	Why Are You Here?! Insurance Issues with the People and Stuff in Your House
Feb 5	9 AM-12 PM	Flood: 3-Hour NFIP Training and the Latest Happenings ***
Feb 5	1-4 PM	Retirement Income Solutions – Social Security and Others
Feb 10	9 AM-12 PM	The Contractor’s Liability Insurance Workshop
Feb 10	1-4 PM	Ethics, Diligence, Success: What Agencies Need to Know *
Feb 11	11 AM-12 PM	“Where the H*ll Is My Stuff?” Addressing Supply Chain Exposures with Small Biz Insureds
Feb 12	9 AM-12 PM	Homeowners Endorsements Insureds Don't Want (But Do Need)
Feb 12	2-3 PM	An Hour with Nicole: Personal Lines: Read the %^&* Form!
Feb 17	9 AM-12 PM	Agency Audits: How to Create Efficient, Profitable and Defensible Workflows
Feb 17	1-4 PM	Commercial Property: Claims, Coverages, Consequences
Feb 18	11 AM-12 PM	Fun (and Dangerous) as H*ll: Insuring Small Vehicles and Watercraft
Feb 19	9 AM-12 PM	Blessings and Curses: Emerging Trends from the Perspective of a P&C Claims Pro
Feb 19	1-4 PM	The Contractor’s Property Coverages Workshop
Feb 24	9 AM-12 PM	Coverage Essentials: Homeowners Part 1 – Policy Definitions, Liability Coverage and Policy Conditions **
Mar 3	9-11 AM	Eroding: The Personal Lines Implosion and What Happens Next
Mar 3	9-11 AM	Murky: Understanding Flood Coverage, Rules, and Claims
Mar 3	2-3 PM	An Hour with Nicole: Making Sense of Homeowners Deductibles (Once and For All!)
Mar 5	11 AM-12 PM	The Eight Mistakes You Won’t Make Again: Commercial Property Edition
Mar 5	1-4 PM	Bad Machines, Evil People: The Latest in Cyber
Mar 10	1-4 PM	Reasons Personal Lines are Broken (and What to Do About It)
Mar 12	9 AM-12 PM	Definition of Insanity: Common Home and Auto Exposures We Know Are There & Do Nothing About
Mar 12	1-4 PM	Retirement Healthcare Solutions – Medicare and Others
Mar 24	9 AM-12 PM	Understanding Commercial Property Gaps and Knowing How to Fill Them **
Mar 24	1-4 PM	Ethics in Insurance - Protecting the Client and the Agency *
Mar 25	11 AM-12 PM	Weird Personal Lines Rental Exposures
Mar 26	9-11 AM	CGL Endorsements That Will Break Your Policy
Mar 26	1-4 PM	C-Suite Savior: Mastering D&O, EPL and Other Executive Liability Policies
Mar 31	9 AM-12 PM	Incredible Efficiency: How Farms and Agribusiness Insureds Create Energy and the Risks/Insurance Issues Involved



SALES & MARKETING

CERTIFIED PROFESSIONAL INSURANCE AGENT (CPIA)







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.

EARN A CPIA DESIGNATION

Three Days. One Designation. No Exam. Attend all three CPIA courses and you'll earn the Certified Professional Insurance Agent (CPIA). **There is no exam for this certification.**

	May 5	CPIA - Position for Success	Live Webinar
	May 6	CPIA - Implement for Success	Live Webinar
	May 7	CPIA - Sustain Success	Live Webinar
	Log into Live Webinar: 7:30 - 7:55 AM Live Webinar: 8:00 AM - 4:00 PM		
	MEMBER: \$189 NON-MEMBER: \$229 <i>Members save \$40!</i> Includes course materials & CE fees		
	PA: 7 GEN MD: 1 ETH/6 PC DE: 2 ETH/5 GEN		
	NO EXAM REQUIRED		
	LOSS CONTROL CREDIT for Utica policyholders		

CPIA SPECIAL TOPICS: DISASTER PLANNING & CYBER INSURANCE

COURSES OPEN TO ANYONE INTERESTED IN THESE TOPICS







DISASTER & CONTINUITY PLANNING FOR BUSINESSES & FAMILIES

During this program, participants are encouraged to focus on factors affecting disaster and business continuity planning. Areas discussed include types of disasters, key planning elements, disaster team makeup, insurance considerations, and funding challenges.

AN AGENT'S GUIDE TO UNDERSTANDING & MITIGATING CYBER EXPOSURES

Having proper insurance along with implementing proper control and company policies can keep an organization from financial ruin. Cyber insurance is evolving, and the policy forms differ in many ways. Understanding cyber risks, both property (first-party) and liability (third-party), and providing the proper insurance protection is critical for all organizations.

These seminars are open to any employee of an agency, insurance company, or insurance-related business who wants to enhance sales techniques. They also satisfies the CPIA update requirement.

	Mar 25	CPIA Special Topic - Disaster & Continuity Planning	Live Webinar
	Oct 14	CPIA Special Topic - Understanding & Mitigating Cyber Exposures	Live Webinar
	Log into Live Webinar: 7:30 - 7:55 AM Disaster Planning Live Webinar: 8:00 AM - 4:00 PM Cyber Exposures Live Webinar: 8:00 AM - 5:00 PM		
	MEMBER: \$189 NON-MEMBER: \$229 <i>Members save \$40!</i> Includes course materials & CE fees		
	Disaster Planning - PA: 7 GEN MD: 1 ETH/6 PC DE: 7 GEN Cyber Exposures - PA: 8 GEN MD: 1 ETH/7 PC DE: 1 ETH/7 GEN		
	NO EXAM REQUIRED		
	LOSS CONTROL CREDIT for Utica policyholders		

Do you have a new, unlicensed employee?

Is your new employee starting a career in insurance? The Insuring Careers Certification Program (ICCP) may be the perfect licensing and training program for your future agent.

Developed by IA&B, ICCP is designed specifically for newcomers to the Property & Casualty insurance industry in Pennsylvania, Maryland, and Delaware. The program breaks down the complex world of insurance into clear, manageable segments, helping new employees gain confidence and a solid foundation in their careers. More than just a licensing exam prep course, ICCP equips participants with a deep understanding of insurance principles, real-world applications, and the soft skills needed to thrive in client-facing roles.


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



INSURING CAREERS
CERTIFICATION PROGRAM



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INSIDE 2026 COURSE LISTINGS

THANK YOU PLATINUM PARTNERS FOR SUPPORTING THE INDEPENDENT AGENT NETWORK.



KEYSTONE



Interested in becoming a partner? Reach out today.

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

TO REGISTER

Call: 800-998-9644, option 1

Online: IABforME.com



QUESTIONS?

Call: 800-998-9644, option 2

Email: 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.