

IA&B

EDUCATION

ADVOCACY

RESOURCES



# Professional Training Schedule

# 2026

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

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



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*Featured on the Cover: Karissa Kleczka, CIC, Personal Insurance, Account Relationship Manager, Keller-Brown Insurance Services, Shrewsbury, PA*

## HEAT UP YOUR CAREER THIS SUMMER *By Earning a Designation.*

**CISR | CISR ELITE | CIC | CPIA**

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

 Look for the leaf identifying the designation programs throughout this booklet.

## 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 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: \$180  
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.

Jul 15	Commercial Property	Live Webinar
Jul 28	Elements of Risk Management	Live Webinar
Aug 5	Personal Auto	Live Webinar
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 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 28	Personal Auto	Live Webinar
Nov 4	Commercial Casualty 2	Live Webinar
Nov 11	Commercial Casualty 1	Live Webinar
Nov 17	Other Personal Lines Solutions	Live Webinar



## 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.



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: \$180  
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.



Jul 23 9 AM-12 PM Understanding Commercial Property Gaps and Knowing How to Fill Them \*\*



Jul 23 1-4 PM Ethics in Insurance - Protecting the Client & the Agency \*

Aug 6 9 AM-12 PM Ethics, Diligence, Success: What Agencies Need to Know \*

Aug 20 1-4 PM Coverage Essentials: Homeowners Part 1 – Policy Definitions, Liability Coverage and Policy Condition \*\*

Sep 3 9 AM-12 PM Ethics in Insurance - Protecting the Client & the Agency \*

Sep 3 1-4 PM Understanding Commercial Property Gaps and Knowing How to Fill Them \*\*

Oct 27 1-4 PM Ethics, Diligence, Success: What Agencies Need to Know \*

Oct 29 9 AM-12 PM Coverage Essentials: Homeowners Part 1 – Policy Definitions, Liability Coverage and Policy Condition \*\*

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

Nov 17 1-4 PM Ethics, Diligence, Success: What Agencies Need to Know \*

Dec 1 9 AM-12 PM Ethics, Diligence, Success: What Agencies Need to Know \*

Dec 8 1-4 PM Coverage Essentials: Homeowners Part 1 – Policy Definitions, Liability Coverage and Policy Condition \*\*



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 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: \$485  
Live Webinar: Member/Non-Member: \$445  
*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.

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: \$470  
Live Webinar: Member/Non-Member: \$460  
*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.

Jul 21-22	Erie, PA or Live Webinar
Aug 18-19	Live Webinar
Oct 6-7	Philadelphia, PA or Live Webinar

# ETHICS & FLOOD CREDITS



In PA, legislation 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.



Jul 7 1-4 PM Flood: 3-Hour NFIP Training and the Latest Happenings



Jul 23 1-4 PM Ethics in Insurance - Protecting the Client and the Agency \*

Aug 6 9AM-12PM Ethics, Diligence, Success: What Agencies Need to Know \*

Sep 3 9AM-12PM Ethics in Insurance - Protecting the Client and the Agency \*

Oct 8 1-4 PM Flood: 3-Hour NFIP Training and the Latest Happenings

Oct 27 1-4 PM Ethics, Diligence, Success: What Agencies Need to Know \*

Nov 17 1-4 PM Ethics, Diligence, Success: What Agencies Need to Know \*

Dec 1 9AM-12PM Ethics, Diligence, Success: What Agencies Need to Know \*



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

# 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.

	Jul 7-9	P&C Licensing	Live Webinar
	Aug 11-13	P&C Licensing	Mechanicsburg, PA
	Sep 8-10	P&C Licensing	Live Webinar
	Oct 6-8	P&C Licensing	Mechanicsburg, PA
	Nov 3-5	P&C Licensing	Live Webinar
	Dec 8-10	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.

## 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/Tax | Non-Member: \$259 +S&H/Tax  
*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](http://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

*New topics for 2026 highlighted on next page*



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!

Jul 7	1-4 PM	Flood: 3-Hour NFIP Training and the Latest Happenings
Jul 14	9-11 AM	Eroding: The Personal Lines Implosion and What Happens Next
Jul 14	2-3 PM	An Hour with Nicole: Making Sense of Homeowners Deductibles (Once and For All!)
Jul 15	11 AM-12 PM	Commercial Lines Issues After a Huge Storm
Jul 16	9 AM-12 PM	Recognizing Fraudulent Claims and the Insureds Who File Them
Jul 16	1-4 PM	Retirement Healthcare Solutions – Medicare and Others
Jul 21	9-11 AM	CGL Endorsements That Will Break Your Policy
Jul 21	1-4 PM	C-Suite Savior: Mastering D&O, EPL and Other Executive Liability Policies
Jul 23	9 AM-12 PM	Understanding Commercial Property Gaps and Knowing How to Fill Them **
Jul 23	1-4 PM	Ethics in Insurance - Protecting the Client & the Agency *
Jul 28	11 AM-12 PM	Personal Lines Issues After a Huge Storm
Jul 28	1-4 PM	How Farms and Agribusiness Create Energy and the Insurance Issues
Jul 30	9 AM-12 PM	Definition of Insanity: Common Home and Auto Exposures We Know Are There & Do Nothing About
Jul 30	1-4 PM	Reasons Personal Lines are Broken (and What to Do About It)
Aug 5	11 AM-12 PM	“Where the H*ll Is My Stuff?” Addressing Supply Chain Exposures with Small Biz Insureds
Aug 5	1-4 PM	Bad Machines, Evil People: The Latest in Cyber
Aug 6	9 AM-12 PM	Ethics, Diligence, Success: What Agencies Need to Know *
Aug 6	1-4 PM	Retirement Income Solutions – Social Security and Others
Aug 11	1-4 PM	Commercial Property: Claims, Coverages, Consequences
Aug 12	11 AM-12 PM	Fun (and Dangerous) as H*ll: Insuring Small Vehicles and Watercraft
Aug 13	9 AM-12 PM	Agency Audits: How to Create Efficient, Profitable and Defensible Workflows
Aug 13	1-4 PM	The Contractor’s Property Coverages Workshop
Aug 20	9 AM-12 PM	The Contractor’s Liability Insurance Workshop
Aug 20	1-4 PM	Coverage Essentials: Homeowners Part 1 – Policy Definitions, Liability Coverage and Policy Condition **
Aug 25	9 AM-12 PM	Homeowners Endorsements Insureds Don't Want (But Do Need)
Aug 25	2-3 PM	An Hour with Nicole: Personal Lines: Read the %^&* Form!

Sep 3	9 AM-12 PM	Ethics in Insurance - Protecting the Client & the Agency *
Sep 3	1-4 PM	Understanding Commercial Property Gaps and Knowing How to Fill Them **
Sep 15	9-11 AM	Eroding: The Personal Lines Implosion and What Happens Next
Sep 15	2-3 PM	An Hour with Nicole: Making Sense of Homeowners Deductibles (Once and For All!)
Sep 16	11 AM-12 PM	The Eight Mistakes You Won't Make Again: Commercial Property Edition
Sep 17	1-4 PM	Retirement Healthcare Solutions – Medicare and Others
Sep 22	9-11 AM	Why Are You Here?! Insurance Issues with the People and Stuff in Your House
Sep 24	9 AM-12 PM	Dawn of New Age or End of the World? Emerging Risks That Make You Wonder
Sep 24	1-3 PM	CGL Endorsements That Will Break Your Policy
Sep 29	9 AM-12 PM	Claims Handling for Agencies: Advocacy, Best Practices, and Better Outcomes
Sep 29	1-4 PM	Insuring Manufacturers: Concerns, Claims, Coverages
Sep 30	11 AM-12 PM	Weird Personal Lines Rental Exposures
Sep 30	1-4 PM	Reasons Personal Lines are Broken (and What to Do About It)
Oct 8	9 AM-12 PM	Broaden Coverage Now: Tips From a Personal Lines Claims Pro
Oct 8	1-4 PM	Flood: 3-Hour NFIP Training & the Latest Happenings
Oct 13	9 AM-12 PM	Homeowners Endorsements Insureds Don't Want (But Do Need)
Oct 13	2-3 PM	Hour w\ Nicole: Personal Lines: Read the %^&* Form!
Oct 14	11 AM-12 PM	Commercial Lines Issues After a Huge Storm
Oct 20	1-4 PM	Commercial Property: Claims, Coverages, Consequences
Oct 21	11 AM-12 PM	Personal Lines Issues After a Huge Storm
Oct 22	9 AM-12 PM	Recognizing Fraudulent Claims and the Insureds Who File Them
Oct 22	1-4 PM	Retirement Income Solutions – Social Security and Others
Oct 27	9 AM-12 PM	The Contractor’s Property Coverages Workshop
Oct 27	1-4 PM	Ethics, Diligence, Success: What Agencies Need to Know *
Oct 29	9 AM-12 PM	Coverage Essentials: Homeowners Part 1 – Policy Definitions, Liability Coverage and Policy Condition **
Oct 29	1-4 PM	The Contractor’s Liability Insurance Workshop



# SALES & MARKETING

## CPIA SPECIAL TOPIC: CYBER INSURANCE

COURSE OPEN TO ANYONE INTERESTED IN THIS TOPIC

### 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 are critical for all organizations.

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.



Oct 14 CPIA Special Topic - An Agent's Guide to Understanding & Mitigating Cyber Exposures Live Webinar



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



MEMBER: \$189 | NON-MEMBER: \$229  
Members save \$40!  
Includes course materials & CE fees



PA: 1 ETH/7 GEN | MD: 1 ETH/7 PC | DE: 1 ETH/7 GEN



No Exam Required



This course is not associated with E&O Loss Control Credit.



## MARK YOUR CALENDARS FOR OUR 2026 IN-PERSON CLASSES

Jul 21-22	James K Ruble Graduate Seminar	Erie, PA
Aug 11-13	Property & Casualty Licensing Study Course	Mechanicsburg, PA
Sep 15-16	CIC - Commercial Casualty	Lancaster, PA
Sep 22-23	CIC - Agency Management	Erie, PA
Sep 23	CISR Elements of Risk Management	Lancaster, PA
Oct 6-7	James K Ruble Graduate Seminar	Exton, PA
Oct 6-8	Property & Casualty Licensing Study Course	Mechanicsburg, PA
Nov 17-18	CIC - Personal Lines Institute	Erie, PA
Dec 8-10	Property & Casualty Licensing Study Course	Mechanicsburg, PA

# 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 certification means real training, real knowledge, and real readiness to serve clients right away."*

- Teeter Group,  
IA&B Member Agency

### 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



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

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**INSIDE  
2026 COURSE  
LISTINGS**

**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

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  
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agents in PA, MD, and DE.

IA&B core hours of operation:  
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