



Professional Training Schedule

2026

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

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DON'T FALL BEHIND IN YOUR CAREER - *Earn a Designation Now.*

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.



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.

	Oct 7	Agency Operations	Live Webinar
	Oct 14	Commercial Property	Live Webinar
	Oct 27	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

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.



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 DESCRIPTION

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

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.



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.

	Nov 11-12	Insurance Company Operations	Live Webinar
	Nov 17-18	Personal Lines	Erie, PA

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

	Oct 6-7	Philadelphia, PA	or Live Webinar
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	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.
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	No Exam Required
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	LOSS CONTROL CREDIT for Utica policyholders with CIC, CRM, or CISR designations.
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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
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	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
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	No Exam Required
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	This course is not associated with E&O Loss Control Credit.
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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.

	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 - 4:45 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 for pricing. Members get 20% discount.

INSURING
CAREERS
CERTIFICATION PROGRAM

Insuring Careers Certification Program (ICCP) is a program that includes licensing, professional skills, and insurance fundamentals. For more information, go to IABforME.com.



LIVE CE WEBINARS

\$ 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 CE details available on individual course information webpages.

EXAM 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

NEW TOPIC

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 and the Latest Happenings ***
Oct 13	9 AM-12 PM	Homeowners Endorsements Insureds Don't Want (But Do Need)
Oct 13	2-3 PM	An Hour with 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
Nov 2	1-4 PM	Bad Machines, Evil People: The Latest in Cyber
Nov 3	9-11 AM	Eroding: The Personal Lines Implosion and What Happens Next
Nov 4	11 AM-12 PM	"Where the H*ll Is My Stuff?" Addressing Supply Chain Exposures with Small Biz Insureds
Nov 5	9 AM-12 PM	Definition of Insanity: Common Home and Auto Exposures We Know Are There & Do Nothing About
Nov 5	1-4 PM	Reasons Personal Lines are Broken (and What to Do About It)
Nov 10	9 AM-12 PM	How Farms and Agribusiness Create Energy & the Insurance Issues
Nov 10	1-4 PM	C-Suite Savior: Mastering D&O, EPL & Other Executive Liability Policies
Nov 11	11 AM-12 PM	Fun (and Dangerous) as H*ll: Insuring Small Vehicles and Watercraft
Nov 12	9 AM-12 PM	Understanding Commercial Property Gaps & How to Fill Them **
Nov 12	1-4 PM	Retirement Healthcare Solutions – Medicare and Others
Nov 17	1-4 PM	Ethics, Diligence, Success: What Agencies Need to Know *
Nov 19	1-4 PM	Flood: 3-Hour NFIP Training and the Latest Happenings ***
Dec 1	9 AM-12 PM	Ethics, Diligence, Success: What Agencies Need to Know *
Dec 1	1-4 PM	The Contractor's Property Coverages Workshop
Dec 3	9 AM-12 PM	The Contractor's Liability Insurance Workshop
Dec 3	1-4 PM	Retirement Income Solutions – Social Security and Others
Dec 7	11 AM-12 PM	Eight Mistakes You Won't Make Again: Commercial Property Edition
Dec 8	9 AM-12 PM	Claims Handling for Agencies: Advocacy, Best Practices, & Better Outcomes
Dec 8	1-4 PM	Coverage Essentials: Homeowners Part 1 – Policy Definitions, Liability Coverage and Policy Condition **
Dec 9	1-4 PM	Flood: 3-Hour NFIP Training and the Latest Happenings ***
Dec 10	9 AM-12 PM	Homeowners Endorsements Insureds Don't Want (But Do Need)
Dec 10	2-3 PM	An Hour with Nicole: Personal Lines: Read the %^&* Form!
Dec 15	1-4 PM	Commercial Property: Claims, Coverages, Consequences
Dec 16	11 AM-12 PM	Weird Personal Lines Rental Exposures

NEW TOPIC

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.

	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 CE details available on individual course information webpages.

EXAM No Exam Required

LOSS CONTROL CREDIT FOR: * Utica (PA, MD, DE);
** Utica (PA, MD, DE) & Swiss Re (PA, DE) policyholders

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.

	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 *
JUST ADDED	Nov 19	1-4 PM	Flood: 3-Hour NFIP Training and the Latest Happenings
	Dec 1	9 AM-12 PM	Ethics, Diligence, Success: What Agencies Need to Know *
JUST ADDED	Dec 9	1-4 PM	Flood: 3-Hour NFIP Training and the Latest Happenings

2 HOUR LIVE WEBINARS:
Member: \$50 | Non-Member: \$80
3 HOUR LIVE WEBINARS:
Member: \$75 | Non-Member: \$105
Members save \$30!

CE CE details available on individual course information webpages.

EXAM No Exam Required

LOSS CONTROL CREDIT FOR: * Utica (PA, MD, DE) policyholders



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INSIDE
OCT-NOV-DEC
2026 COURSE
LISTINGS

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FOR SUPPORTING THE INDEPENDENT AGENT NETWORK.

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PROGRESSIVE



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Above all in SERVICE—since 1925

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