



TRAINING SCHEDULE OCT-DEC 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



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.



Oct 2	CISR - Other Personal Lines Solutions	Live Webinar
Oct 9	CISR - Agency Operations	Live Webinar
Oct 10	CISR - Commercial Property	Newtown Square, PA
Oct 17	CISR - Elements of Risk Management	Live Webinar
Oct 23	CISR - Personal Auto	Live Webinar
Oct 29	CISR - Commercial Casualty II	Hunt Valley, MD
Oct 30	CISR - Commercial Casualty I	Live Webinar
Nov 7	CISR - Agency Operations	Mechanicsburg, PA
Nov 13	CISR - Commercial Property	Live Webinar
Nov 20	CISR - Commercial Casualty II	Live Webinar
Nov 21	CISR - Commercial Casualty I	Pittsburgh, PA
Dec 4	CISR - Life & Health Essentials	Live Webinar
Dec 10	CISR - Commercial Casualty I	Mechanicsburg, PA
Dec 11	CISR - Other Personal Lines Solutions	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.



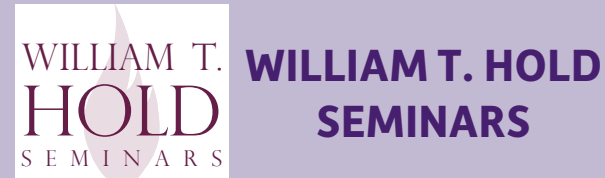
CE details available on individual course information webpages.



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 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.



Nov 14 Commercial 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. 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

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.



Oct 29-30	CIC - Life and Health	Erie, PA
Nov 12-13	CIC - Insurance Company Operations	Live Webinar



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.

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.



Oct 15-16	Phoenixville, PA
Oct 15-16	Live Webinar

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

	Oct 8	11 AM-12 PM	An Hour with Nicole: Why Personal Lines Deductibles Always Confuse Insureds
	Oct 8	1-4 PM	Inflation and Personal Lines: Helping Insureds Understand Why It Matters and What to Do
	Oct 10	9 AM-12 PM	Transportation Insurance: A Non-Standard Business Exposure
	Oct 10	1-4 PM	Social Security and Medicare: Your Questions Answered
	Oct 15	1-4 PM	Preventing E&O Claims: Homeowners Issues (How to Stay Out of Court!) **
	Oct 17	9 AM-12 PM	Stinkin Rich, Insurance Poor: P&C Coverage Challenges for High-Net-Worth Individuals
	Oct 17	1-4 PM	Bots, Crypto, Weed and Other Risks You Never Imagined Insuring (But Here We Are)
	Oct 29	9 AM-12 PM	Liar!: An Agent's Role in Identifying & Handling Fraud
	Oct 29	1-4 PM	Mastering Business Income: Tools & Tips to Keep Insureds Flush
	Oct 30	9 AM-12 PM	Ethical Dilemmas in Insurance and the Responsibilities of Agents *
	Oct 30	2-3 PM	An Hour with Cathy: Certificates of Insurance - Headaches and Remedies
	Nov 5	11 AM-12 PM	An Hour with Nicole: Everything You Need to Know About Insuring Work-From-Home Exposures
	Nov 5	1-4 PM	Claims That Will Convince Your Insured to Enhance Their Homeowners Coverage
	Nov 7	11 AM-12 PM	An Hour with Sam: Liability Concerns in the Personal Auto Policy
	Nov 7	1-4 PM	Certificates, Contractors, and You: Fights, Coverage Issues, Best Practices
	Nov 12	9 AM-12 PM	Flood Insurance: What You Need to Know
	Nov 12	1-4 PM	Why Inadequate EPLI Will Close Your Business (and What to Do About It)
	Nov 14	1-4 PM	E&O: Duties, Laws, Documentation, and Data Breach **
	Nov 19	9 AM-12 PM	All-Things Ethics: Agent Obligations, Standards, Authority and More *
	Nov 19	1-4 PM	The Bad Thing Happened: Handling Commercial Claims & Coverage Disputes
	Nov 20	2-3 PM	An Hour with Dave: All-Things Ordinance or Law (Personal and Commercial)
	Nov 21	9 AM-12 PM	Wait...What the #^&* Just Happened?!" Fourteen Personal Lines Issues To Know Before It's Too Late
	Nov 21	1-4 PM	Social Security and Medicare: Your Questions Answered
	Dec 3	11 AM-12 PM	An Hour with Nicole: Why Personal Lines Deductibles Always Confuse Insureds
	Dec 3	1-4 PM	Inflation and Personal Lines: Helping Insureds Understand Why It Matters and What to Do
	Dec 5	9 AM-12 PM	Homeowners Deep-Dive: What You Need to Know About the Most Recent Forms
	Dec 5	1-4 PM	Social Security and Medicare: Your Questions Answered
	Dec 9	1-4 PM	How It's Built, How It's Used, Will It Survive: Elements of Property Underwriting
	Dec 10	9 AM-12 PM	Preventing E&O Claims: Commercial Casualty Issues (How to Stay Out of Court!) **
	Dec 10	1-4 PM	Mastering Business Income: Tools & Tips to Keep Insureds Flush
	Dec 11	2-3 PM	An Hour with Dave: What Everyone Must Know About Flood
	Dec 12	9 AM-12 PM	Ethical Dilemmas in Insurance and the Responsibilities of Agents *
	Dec 12	1-4 PM	Stinkin Rich, Insurance Poor: P&C Coverage Challenges for High-Net-Worth Individuals

 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


E&O RISK MANAGEMENT LIVE WEBINARS

	Oct 15	1-4 PM	Preventing E&O Claims: Homeowners Issues (How to Stay Out of Court!) **
	Oct 30	9 AM-12 PM	Ethical Dilemmas in Insurance and the Responsibilities of Agents *
	Nov 14	1-4 PM	E&O: Duties, Laws, Documentation, and Data Breach **
	Nov 19	9 AM-12 PM	All-Things Ethics: Agent Obligations, Standards, Authority and More *
	Dec 10	9 AM-12 PM	Preventing E&O Claims: Commercial Casualty Issues (How to Stay Out of Court!) **
	Dec 12	9 AM-12 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



 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

 Oct 8-10 P&C Licensing Mechanicsburg, PA
 Dec 10-12 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
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: \$219 +S&H | Non-Member: \$259 +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.

 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 receive 20% discount



SALES & MARKETING TRAINING

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.

This course is designed to help minimize E&O exposure in an agency. Upon completion of this class, managers and supervisors will have the tools to take steps to initiate their own internal E&O loss control program in their agency and/or department. Non-management employees will feel empowered to approach management with a plan for creating a loss control program.

This training is developed by the American Insurance Marketing and Sales Society (AIMS).

COURSE OPEN TO ANYONE INTERESTED IN THIS TOPIC



Oct 16 An E&O Loss Control Program for All Agencies (an advanced CPIA course) - *Course open to anyone interested in this topic* 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 submitted and pending approval.



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

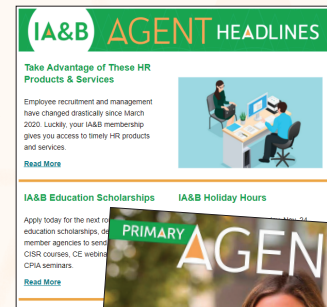
- 1 Legal & Compliance Resources
- 2 Classes & Online Training
- 3 Marketing Resources
- 4 Political Advocacy
- 5 HR & Hiring Solutions
- 6 Insurance for Your Agency
- 7 Industry News
- 8 Market Access & Carrier Relations



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
IABFORME.COM/MEMBERSHIP



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INSIDE
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2024 COURSE
LISTINGS

IN-PERSON CLASSES

DETAILS FOR CLASSES ARE LISTED INSIDE

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
Oct 29-30	CIC - Life and Health	Erie, PA
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



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:
 IA&B's own E&O Territory Manager, Katie Capobianco.

**YOUNG AGENT
 CONFERENCE**

October 28-29
Gettysburg, PA

