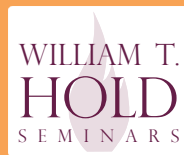




Professional Training Schedule APRIL TO JUNE 2025

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

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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.



Apr 2	CISR - Agency Operations	Hunt Valley, MD
Apr 2	CISR - Elements of Risk Management	Live Webinar
Apr 3	CISR - Commercial Casualty II	Lancaster, PA
Apr 9	CISR - Personal Auto	Live Webinar
Apr 10	CISR - Personal Residential	Cranberry Twp, PA
Apr 16	CISR - Commercial Casualty II	Live Webinar
Apr 23	CISR - Other Personal Lines Solutions	Live Webinar
Apr 30	CISR - Commercial Casualty I	Live Webinar
May 7	CISR - Life & Health Essentials	Live Webinar
May 8	CISR - Personal Auto	Mechanicsburg, PA
May 14	CISR - Personal Residential	Live Webinar
May 21	CISR - Agency Operations	Live Webinar
Jun 4	CISR - Commercial Property	Live Webinar
Jun 5	CISR - Other Personal Lines Solutions	Exton, PA
Jun 11	CISR - Elements of Risk Management	Live Webinar
Jun 18	CISR - Personal Auto	Live Webinar
Jun 25	CISR - Commercial Casualty II	Live Webinar
Jun 25	CISR - Commercial Property	Mechanicsburg, PA



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.



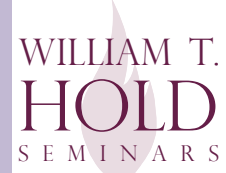
CE details available on individual course information webpages.



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.



Apr 3	Commercial Lines	Live Webinar
May 7	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.



Apr 8-9	CIC - Life and Health Institute	Live Webinar
May 6-7	CIC - Personal Lines Institute	Mechanicsburg, PA *
May 6-7	CIC - Personal Lines Institute	Live Webinar *
May 13-14	CIC - Commercial Property Institute	Erie, 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.



Jun 10-11	Mechanicsburg, PA *
Jun 10-11	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: \$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

	Apr 1	9 AM-12 PM	Bad Machines, Evil People: The Latest in Cyber
	Apr 1	1-4 PM	Ethics, Diligence, Success: What Agencies Need to Know *
	Apr 3	9 AM-11 AM	Eroding: The Personal Lines Implosion and What Happens Next
	Apr 3	2-3 PM	An Hour with Nicole: Making Sense of Homeowners Deductibles (Once and For All!)
	Apr 8	1-4 PM	Stinkin Rich, Insurance Poor: P&C Coverage Challenges for High-Net-Worth Individuals
	Apr 10	1-4 PM	Coverage Essentials: Homeowners Part 1 – Policy Definitions, Liability Coverage & Policy Conditions **
	Apr 15	9 AM-11 AM	Why Are You Here?! Insurance Issues with the People and Stuff in Your House
	Apr 15	1-4 PM	Flood Insurance: What You Need to Know
	Apr 22	1-4 PM	Commercial Property: Claims, Coverages, Consequences
	Apr 24	1-4 PM	Social Security and Medicare: Your Questions Answered
	May 6	9 AM-12 PM	Certificates, Contractors, and You: Fights, Coverage Issues, Best Practices
	May 6	1-4 PM	Ethics in Insurance - Protecting the Client and the Agency *
	May 8	1-4 PM	The Fine Print: Understanding the Contractual Obligations of Your Insured
	May 13	9 AM-12 PM	Big Rig, Big Risk: Mastering Trucking Accounts
	May 13	1-4 PM	Liar!: An Agent's Role in Identifying & Handling Fraud
	May 15	1-3 PM	Just Use Mine: Home, Vehicle and Other Sharing Exposures Insurance Doesn't Like
	May 20	11 AM-12 PM	An Hour with Sam: Liability Concerns in the Personal Auto Policy
	May 20	1-4 PM	Understanding Commercial Property Gaps and Knowing How to Fill Them **
	May 21	1-4 PM	Reasons Personal Lines are Broken (and What to Do About It)
	May 22	9 AM-12 PM	Homeowners Endorsements Insureds Don't Want (But Do Need)
	May 22	2-3 PM	An Hour with Nicole: Personal Lines: Read the %^&* Form!
	Jun 10	9 AM-12 PM	Definition of Insanity: Common Home and Auto Exposures We Know Are There & Do Nothing About
	Jun 10	1-4 PM	Stinkin Rich, Insurance Poor: P&C Coverage Challenges for High-Net-Worth Individuals
	Jun 12	9 AM-11 AM	Eroding: The Personal Lines Implosion and What Happens Next
	Jun 12	1-3 PM	CGL Endorsements That Will Break Your Policy
	Jun 17	9 AM-12 PM	Why Inadequate EPLI Will Close Your Business (and What to Do About It)
	Jun 17	2-3 PM	An Hour with Cathy: Understanding (Finally!) How Claims Made Policies Work
	Jun 19	9 AM-12 PM	Coverage Essentials: Homeowners Part 1 – Policy Definitions, Liability Coverage & Policy Conditions **
	Jun 19	1-4 PM	Commercial Property: Claims, Coverages, Consequences
	Jun 24	1-4 PM	Social Security and Medicare: Your Questions Answered
	Jun 25	2-3 PM	An Hour with Dave: Rental Cars: Issues, Answers, Horror Stories
	Jun 26	9 AM-11 AM	Name That Endorsement: Business Auto and Commercial Property Edition
	Jun 26	1-4 PM	Ethics, Diligence, Success: What Agencies Need to Know *



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 SwissRe/Westport (PA, DE) policyholders



E&O RISK MANAGEMENT LIVE WEBINARS



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



Apr 10 1-4 PM Coverage Essentials: Homeowners Part 1 – Policy Definitions, Liability Coverage & Policy Conditions **

May 6 1-4 PM Ethics in Insurance - Protecting the Client and the Agency *

May 20 1-4 PM Understanding Commercial Property Gaps and Knowing How to Fill Them **

Jun 19 9 AM-12 PM Coverage Essentials: Homeowners Part 1 – Policy Definitions, Liability Coverage & Policy Conditions **

Jun 26 1-4 PM Ethics, Diligence, Success: What Agencies Need to Know *



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 (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://www.iaabfor.me)

LOOKING FOR LICENSING INFORMATION?

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://www.iaabfor.me)





SALES & MARKETING

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.

BECOME A CERTIFIED PROFESSIONAL INSURANCE AGENT

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.

SPECIAL TOPIC - CYBER INSURANCE

COURSE OPEN TO ANYONE INTERESTED IN THIS TOPIC

During this program, participants are encouraged to focus on the exposures, insurance recommendations for coverage and risk management techniques used to identify, analyze, and control Cyber risks. This program will examine cyber threats of an organization. Having proper insurance along with implementing proper control and company policies can keep an organization from financial ruin.

These trainings were developed by the CPIA Program.



May 6	CPIA - Position for Success	Live Webinar
May 7	CPIA - Implement for Success	Live Webinar
May 8	CPIA - Sustain Success	Live Webinar
Jun 17	Advanced CPIA - Cyber Insurance *	Live Webinar

** Course open to anyone interested in this topic*



Log into webinar: 7:30 - 7:55 AM
Success classes: 8:00 AM - 4:00 PM
Advanced Cyber class: 8:00 AM - 5:00 PM



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



CE details available on individual course information webpages.



NO EXAM REQUIRED



LOSS CONTROL CREDIT for Utica policyholders

MARK YOUR CALENDARS FOR OUR 2025

IN-PERSON CLASSES



DETAILS FOR APR, MAY, JUN CLASSES LISTED IN THIS ISSUE

Apr 2	CISR - Agency Operations	Hunt Valley, MD
Apr 3	CISR - Commercial Casualty II	Lancaster, PA
Apr 10	CISR - Personal Residential	Pittsburgh, PA
May 6-7	CIC - Personal Lines	Mechanicsburg, PA
May 8	CISR - Personal Auto	Mechanicsburg, PA
May 13-14	CIC - Commercial Property	Erie, PA
Jun 5	CISR - Other Personal Lines	Philadelphia, PA
Jun 10-11	Ruble Graduate Seminar	Mechanicsburg, PA
Jun 25	CISR - Commercial Property	Mechanicsburg, PA

DETAILS FOR JUL-DEC CLASSES AVAILABLE AT IABFORME.COM

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 more.

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

Insuring Careers Certification Program (ICCP) is the perfect program for newcomers to the insurance industry. It is designed for people who want to begin to work 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.
- ▲ Participants 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.



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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2025 COURSE
LISTINGS

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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

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Online: IABforME.com



QUESTIONS?

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Email: education@IABforME.com



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Featured on the Cover:
Kaila MacGinnes, an Assistant Account Manager at Enders Insurance in Harrisburg, PA.