



FMO Webinars

E&O: Reasons & Solutions
August 1, 2018
9:00 am - 12:00 pm

On Ethics: Data, Dilemmas & Knucklehead
November 27, 2018
1:00 pm - 4:00 pm

SCHEDULE

E&O Reasons & Solutions
August 1st, 2018
9:00 AM - 12:00 PM

On Ethics: Data, Dilemmas & Knuckleheads
November 27th, 2018
1:00 PM - 4:00 PM

Approved for Utica Loss Control Credit:

Attend either webinar in full for a discount on your Utica E&O Policy. See flyer on reverse for more details.

Fees:

FREE to PIA Agency members & Staff

Nebraska AND Iowa CE Approved:

3 ETH Hrs per class
Full Attendance is required to earn Continuing Education credit.

Location:

Online - Attend from home or office!

Sponsored by:



Local Agents Serving Main Street America™

Earn a DISCOUNT on your Utica E&O Policy!

How It Works:

Step 1: - Register.

Step 2: - At date/time of Webinar, click link provided in email invitation.

Step 3: - Enjoy the presentation. Verify attendance when prompted.

August 1, 2018 - E&O: Reasons and Solutions

This course will analyze the current agency environment for potential E&O claims exposures and review preventative measures available to protect agents from financially harmful mistakes.

Becky Lathrop, CIC, CPIA Becky is Vice President of Optimum Performance Solutions, LLC, a company that offers management consulting services on a nationwide basis to insurance agencies and carriers. Her agency and corporate experiences provide unique perspectives when assisting her clients. OPS is also an endorsed consulting firm for several state insurance associations.

OR

November 27, 2018 - On Ethics: Data, Dilemmas & Knuckleheads

Insurance professionals should expect three things from this Ethics course: 1) interesting data, 2) interesting dilemmas, and 3) interesting examples of things not-to-do as evidenced by real-life knuckleheads who do those things. This course features interactive case studies which will engage students to defend and/or challenge instinctive positions on a variety of issues. Lines will be drawn. Bonds will be broken. Friends will leave as enemies. You have been warned.

Kevin Amrhein, CIC Kevin is president of the Florida Insurance School of Continuing Education (FISCE) and the CE Partnership. He started his insurance career as a marketing intern before pounding the pavement as a commercial lines agent in Orlando, FL. He is a National Faculty member for the National Alliance for Insurance Education and Research's CIC and Certified Insurance Service Representative (CISR) programs.

REGISTRATION:

Fees: Free PIA Members and Staff • Non-Members-\$56

Name _____ D.O.B. _____ Designations _____

Agent License # _____

E-mail address _____

Phone (____) _____ Fax (____) _____

Agency Name _____

Address _____ City _____ State _____ Zip _____

Enclosed is check payable to PIA of Nebraska for \$ _____

Please charge \$ _____ to: Visa MC

Card Number _____ Exp. Date _____ VCode _____

Name on Card _____

Cancellations received 10 days prior to a class are fully refundable. Cancellations received less than 10 days prior to a class will be subject to a \$35 cancellation fee. If you fail to show up for the class, registration fee is forfeited; No Exceptions. All cancellations must be in writing, e-mailed to Lindsey at frontdesk@pianeia.com. There is no penalty for substitutions from your company or agency. All credit card refunds will incur a \$5 processing fee.

Mail to: PIA of NE IA
920 South 107th Avenue, Suite 305, Omaha, NE 68114 or register online at www.pianeia.com
Questions call: 402-392-1611



Earn Up To 10% Off Your Agents' Errors and Omissions Premium!

Your premium should reflect the hard work you've done to prevent errors and omissions (E&O) incidents. All policies are eligible for our loss control credit that positively impacts your premium.

➤ **YOU CONDUCT AN ANNUAL EXPOSURE ANALYSIS PROGRAM REVIEWED BY OUR UNDERWRITERS (5% CREDIT)**

- Needs to be a regular part of the agency's procedures
- Requires that a client sign off on coverages not taken
- 3 new and 3 renewal exposure analysis checklists must be reviewed

➤ **PROFESSIONAL TRAINING & DEVELOPMENT OF YOUR STAFF (5% CREDIT)**

- 60% or more of the agency staff achieve recognized designations, including CPSR, CISR, ACSR, CPCU, CIC, and CPIA

➤ **ATTENDANCE AT AN APPROVED E&O SEMINAR (5% CREDIT)**

- Within the last 24 months or within the first 60 days after inception date
- For all internal CSR employees as well as the principal or office manager of the agency
- The seminars must address errors and omissions loss prevention
- Required attendees by office size:

1-3 staff	Principal/office manager or CSR
4-10 staff	Principal/office manager and 1 CSR
11-20 staff	Principal/office manager and 2 CSRs
21 and over	20% or more of staff

For more information, contact your Utica National Errors & Omissions agency representative or visit www.uticanational.com/EO for agent contact information.