



Agency Operations Seminar

June Seminar
June 30, 2021 - Online

Agenda

- 7:45 - 8:45 am Legal & ethical requirements
- 8:45 - 9:45 am The insurance agency
- 9:45 - 10:45 am The insurance industry and marketplace
- 10:45 - 11:45 am Communications and technology
- 11:45 am - 12:30 pm Lunch
- 12:30 - 1:15 pm Agency workflow components
 - 1:15 - 2 pm Agency workflow steps
 - 2 - 2:30 pm Other account servicing
 - 2:30 - 3 pm Account management
 - 3 - 3:30 pm Errors and omissions
 - 3:30 - 4 pm Q&A and review

Locations & Instructors

June 30, 2021 - Online

GoToWebinar

Instructor: *Tom Greco*

Greco Insurance

Papillion, Neb.

About This Course

This course can transform you into an indispensable team player in any insurance agency or give you confidence to move into another position. As you work with colleagues and customers, you'll discover an enhanced self-assurance and a greater understanding of the dynamics within insurance organizations. Also, understanding how agencies function is essential training for both insurance agency and company personnel.

Topics covered include:

- Legal and ethical requirements
- The insurance agency
- The insurance industry and marketplace
- Communication
- Agency workflow
- Account management
- Errors & omissions

Who Should Attend?

The CISR Program is designed to serve the practical needs of customer service representatives, newly licensed producers, company personnel and any others who wish to refresh their product knowledge.

All times assumed CDT unless otherwise noted.

ADA

We work hard to make our programs accessible to all. If you need accommodations, simply call MAIA at 573-893-4301 or email maia@moagent.org.

Cancellation Policy

You will not receive a refund or transfer credit if you do not notify us before the start of the event. All cancellations and transfers must be received in writing. **Refunds:** a 90 percent refund applies if cancelling more than two weeks prior to start of event; 75 percent refund if cancelling fewer than two weeks before the event. **Transfers:** a \$15 transfer fee will be assessed on any CISR or one-day seminar transfer made within two weeks of the program. Transfers may only be made to another MAIA course. Student must indicate a transfer course within two weeks of cancellation, or appropriate percentage of tuition will be refunded.

Continuing Education

This course is approved for **six general & one ethics** continuing education credits in Missouri. Contact The National Alliance at alliance@scic.com for CE credits for other states.

Earning the CISR Designation

Participants must attend and pass five of the following nine courses (in any order, over a three-year period):

- Insuring Commercial Property
- Commercial Casualty I
- Commercial Casualty II
- Insuring Personal Residential Property
- Insuring Personal Auto Exposures
- Personal Lines Miscellaneous
- Agency Operations
- Elements of Risk Management
- Life & Health Essentials

Requesting an Extension

In order to request an extension on your CISR update, please contact The National Alliance at alliance@scic.com.

PROfile

Your PROfile displays all of your National Alliance professional education information including: Alliance member #, when your next update is due, membership dues status, CE certificate, course history, new program offerings, contact and logon information, and suggested reading materials. ***It will take 4-6 weeks for your attendance to be reflected on your PROfile.***



Agency Operations Seminar Registration Form 2021

(One registration form per person. Form may be photocopied for others.)

I wish to attend the CISR Agency Operations Seminar, to be held:

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Name _____ Name for badge _____

Title _____ Designation(s) you hold: ACSR CISR CIC CLU CPCU AAI LUTCF Other: _____

Date of Birth _____ License Number: _____ National Producer Number: _____

Which best describes your role? Owner/Principal Agency Mgr. Producer Acct. Mgr. CSR IT Co. Rep Other: _____

Agency/Co. _____ Street Address _____

City/State/ZIP _____

Phone _____ Fax _____ Email _____

Type of Entity: Retail Agency Insurance Co. MGA/E&S Agency Vendor Other _____

Is this your first CISR Institute? YES NO Is this your last CISR exam? YES NO

SEMINAR PRICE is \$161

Fee includes materials, breaks and CE credit reporting fees for participants. Note: You can also register online at www.moagent.org.

VISA MC AmEx Disc. Card #: _____ Ex. Date _____ Verification Code _____

Billing Address _____ Cardholder Sig. _____

Or make checks payable to MAIA. **(Payment must be sent with this form)**

Mail or fax to Missouri Association of Insurance Agents, 3315 Emerald Lane, Jefferson City, MO 65109, Fax: 573-893-3708.

Questions? Call 573-893-4301.