



## Advanced PL

Join us August 1, 2017\*

Location: Paul Davis Restoration  
881 Hull Road, Suite 100  
Mason, MI 48854



*Attend the first Michigan CPIA Advance Coverage PL Update day.*

Be an agent with **Success Knowledge**

### Advanced Personal Lines Risk Analysis for E & O Loss Prevention

#### Objective

This one-day Seminar will combine two distinct topics to enhance the professionalism and sales excellence of today's personal lines customer service agent.

**"E & O and the Customer Service Representative"** will discuss a CSR's legal responsibility to apply effective loss prevention techniques that will benefit personal lines insurance consumers. Included will be a discussion on:

- the current causes of errors and omissions in agencies today,
- the CSR's responsibility to the insurance company,
- issues surrounding records control, and
- the importance of internal agency controls.

In addition, there will be a review of effective personal lines E & O damage prevention and control.

**"Using a Personal Lines Questionnaire for Exposure Identification"** will introduce participants to the importance of consistently completing an exposure identification questionnaire for improved customer service and E & O loss prevention. The needs for a current and complete questionnaire as an aid to the risk management process will be discussed, followed by a thorough review and discussion of recommended personal lines checklist items.

*As a CPIA designee, you must maintain your designation by one of the following*

The CPIA designation holds a biennial update (once every two years). This updated requirement can be satisfied through participation in any one of the three core Insurance Success Seminars, participation in any one of the Advanced Insurance Success Seminars, by attending the AIMS Society's annual PRO-to-Pro Executive Retreat or by maintaining individuals or agency membership in the AIMS Society.

*All classes: Registration 8:00 am; class 8:30 am - 4:30 pm; Fees include breaks & lunch  
Single day CPIA designation Investment \$200; CE costs \$7 (if needed)*

*Contact us for room information if needed.*

For Schedule and to Register <http://www.insuranceeducators.net/registration.html>

For more information <http://insuranceeducators.net/cpiaoverview.html>

Questions? Contact Janet K Holstine, BA, MSL, CIC, LIC, CPIW, AIT, DAE, CPIA  
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\* Provider 0394 AIMS Society; Advanced PL Course # pending approval