



Agency Management Institute

May 13-15, 2015

Ameristar Casino, St. Charles, Mo.

Agenda

Wednesday, May 13, 2015

7:30 - 8 am **Registration**

8 am - 12:15 pm **The Agency as an Organization**
Participants will learn the stages an organization goes through as it grows and the fundamentals of agency planning, including the steps in the planning process.
Lisa Burnside, CIC, CPCU
Burnside Dynamics, LLC
Forest Lake, Minn.

12:15 - 1:15 pm **Lunch on Your Own**

1:15 - 5:15 pm **Agency Productivity & Effectiveness**
An overview of the process of managing personnel, including legal guidelines, job descriptions, interviewing techniques, performance appraisals and termination procedures, will be presented along with sources of employment practices liability exposures. There will be a brief case study.
Lisa Burnside, CIC, CPCU

5:15 - 5:45 pm **Exam Briefing**

Thursday, May 14, 2015

8 am - 12 pm **Human Resources**
We will study productivity and how to take advantage of automation to improve the effectiveness of your organization. Discover how to manage processes, look at sources of receiving and distributing information, and learn to use reports from an agency management system. A panel discussion will be held during the final hour to reinforce what has been learned.
Ken Fields, CIC, MSM, CPCU, CLU, ChFC
State Auto Insurance Co.
Columbus, Ohio

12 - 1 pm **Lunch on Your Own**

Thursday, May 14, 2015 (con't)

1 - 5 pm **Managing & Sustaining Financial Strength**
Understand the basics of balance sheets, income statements and effective collection procedures. Identify ways to establish new business production and how to design a targeted marketing plan for both the agency and the producer.
Ken Fields, CIC, MSM, CPCU, CLU, ChFC

Friday, May 15, 2015

8 am - 12 pm **Legal & Ethical Responsibilities**
Participants will learn what motivates ethical behavior and how to define the types of agency authority and the resulting liability. They will examine leading causes of errors and omissions claims made against agents along with their associated risks.
Keith Wilts, CIC, CPCU
Professional Training Associates
LaGrange, Ken.

12 - 2 pm **Lunch on Your Own**

2 - 4 pm **Examination**



Benefits of Attending the Agency Management Institute

Agency personnel today must be both professional insurance counselors and sound business people. Participants will:

- Learn to balance the roles of professional insurance counselor and successful businessperson.
- Find methods to build and maintain staff support, maximize customer service and improve overall operations while increasing the agency's bottom line.
- Apply classroom presentations and group discussions to resolve agency issues.

Special Accommodations

We work hard to make our programs accessible to all. If you need special accommodations, simply phone MAIA at 800-617-3658. Please notify us if you have any special dietary requirements.

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% refund if cancelling fewer than two weeks before the event. Transfers: A \$30 transfer fee will be assessed on any CIC transfer made within two weeks of the program. 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.

Eligibility & Identification Requirements

To register for and attend a CIC institute, you must be a licensed agent, broker or solicitor; or have at least two years full-time experience as a practitioner in insurance or risk management; or have served for at least two years as a full-time insurance or risk management faculty member of an accredited college or university. All participants must present photo identification to the registrar at the program location.

CE Credits

This class is filed for 16 general and 4 ethics continuing education credits. If you have any questions, please call the Society at 800-531-5197.

The National Alliance for Insurance Education & Research is registered with the National Association of State Boards of Accountancy as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Ave. N., Suite 700, Nashville, TN 37219-2417. Website: www.nasba.org. Advanced Curriculum Rating = 20 CPE credits.

Location

This institute will be held at the Ameristar Casino, One Ameristar Blvd., St. Charles, MO 63301, (636) 940-4301. You are responsible for your own hotel reservations. We have special room rates of \$129 for single or double (this rate cannot be guaranteed for reservations made within 30 days of the class) You must tell the hotel you are with the Missouri Association of Insurance Agents group to get this rate. You may also make reservations online by entering the Special Offer Code *MAIE15A* where prompted on the Hotel Reservations Page.



Agency Management Registration Form 2015

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



I wish to attend the CIC Agency Management Institute to be held May 13-15, 2015 in St. Charles, Mo.

Name _____ Name for badge _____

Circle designation you hold: ACSR CISR CIC CLU CPCU AAI LUTCF Other: _____

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

Which best describes your role? Owner/Principal Agency Mgr. Producer Account Mgr. Customer Service I/T

Agency/Company _____ Street Address _____

City/State/ZIP _____

Phone _____ FAX _____ E-Mail _____

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

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

SEMINAR PRICE is \$435 or \$415 Early Bird Discount*

**Early Bird Discount price applies to registrations received at least 2 weeks prior to seminar date. Fee includes materials, breaks and CE credit reporting fees for participants. Note: You can also register online at www.missouriagent.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, P.O. Box 1785, Jefferson City, MO 65102-1785, Fax: 573-893-3708.

Questions? Phone 800-617-3658 in Mo. or 573-893-4301.