

Insurance Continuing Education Advisory Council meeting - September 17, 2019

<b>Transaction Number</b>	<b>Transaction Date</b>	<b>Provider Name</b>	<b>Course Name</b>	<b>Course Group</b>	<b>Credits</b>	<b>Course Summary</b>
3912703505	8/18/2019	John Hancock Life Insurance Company	The Impact of Health and Wellness on Life Insurance	Life	1	This course addresses life insurance trends, behavioral economics and effects of wellness on life insurance activity.
314719850	8/19/2019	Broker Educational Sales and Training, Inc	Small Business Retirement Plans and Ethical Practices ETHICS	Ethics	3	NAIC uniform submission. Submitted as 1 course in Home State but submitted as 2 for ethics credit in MT. Course address small business retirement plans and plans available to them. Ethics portion addresses Ethics and the Insurance industry
314719850	8/19/2019	Broker Educational Sales and Training, Inc	Small Business Retirement Plans and Ethical Practices	Life	16	NAIC uniform submission. Submitted as 1 course in Home State but submitted as 2 for ethics credit in MT. Course address small business retirement plans and plans available to them. Ethics portion addresses Ethics and the Insurance industry
779448826	8/20/2019	CPCU Society	When Words Collide: Resolving Insurance Coverage and Claims Disputes	P&C	1	NAIC uniform submission addresses practical strategies to address disputed claims.
779448826	8/20/2019	CPCU Society	When Ethics comes Marching In	Ethics	3	NAIC uniform submission uses case studies to present ethical challenges through real life situations.

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779448826	8/20/2019	CPCU Society	Rebounding from Disaster with Parametric Solutions	P&C	1	NAIC uniform submission that details how parametric solutions can help in catastrophe situations.
779448826	8/20/2019	CPCU Society	Opioids Are the New Heroin: Addressing the Epidemic	P&C	1	NAIC uniform submission discussing the impact of opioids on bodily injury claims.
779448826	8/20/2019	CPCU Society	No More Guesswork: Cyber Modeling Quantifies Risk	P&C	1	NAIC uniform submission outlines how risk modeling can quantify cyber risk.
779448826	8/20/2019	CPCU Society	Mock Trial: Unneighborly Neighbors	P&C	2	NAIC uniform submission outlines the trial process for dispute between neighboring properties.
779448826	8/20/2019	CPCU Society	Game On: Test Your Knowledge of Insurance Regulation	P&C	2	NAIC uniform submission focusing on recent legislative and regulatory updates in the industry ranging from market conduct issues to policy rates and forms issues.
779448826	8/20/2019	CPCU Society	Duty and the Beast: Some Selected Aspects of Animal Law	P&C	1	NAIC uniform submission covering selected aspects of animal law and animal related losses.
779448826	8/20/2019	CPCU Society	Captive Insurers-Providing Expanded Coverages thru Innovation	P&C	1	NAIC uniform submission outlining coverage options through the use of captive insurers. Why would you form a captive and what types of risk transfer products do they offer?

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779448826	8/20/2019	CPCU Society	Back to the Future: Today's Successful Agent	P&C	1	NAIC uniform submission outlining best practices for using technology to support documentation and claims handling.
4033220486	8/20/2019	Enterprise Training School Inc.	Life Underwriting 2	Life	2	NAIC uniform submission covering the basics of life underwriting.
4033220486	8/20/2019	Enterprise Training School Inc.	Homeowners 2	P&C	2	NAIC uniform submission covering the basics of homeowners policy coverage.
4033220486	8/20/2019	Enterprise Training School Inc.	General Liability 2	P&C	2	NAIC uniform submission covering the basics of a CGL policy
4033220486	8/20/2019	Enterprise Training School Inc.	Commercial Property 2	P&C	2	NAIC uniform submission covering the basics of commercial property coverage
2653750698	8/21/2019	Prudential Annuities Life Assurance Corporation	Behavioral Finance	Life	1	Course introduces the audience to behavioral finance and its application in the variable insurance market.
4232288534	8/21/2019	ArmTech Insurance Services Inc.	2020 Spring Agent Update	P&C	4	NAIC uniform course submission covering changes to crop insurance handbook and claims updates.
1591719464	8/22/2019	National Alliance for Insurance Education and Research	Advanced Continuing Education Series 8AC - 017	P&C	8	NAIC Uniform submission. Course covers hospitality risks and strategies to address as well as workplace violence and the insurance concerns.

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3058791352	8/22/2019	Hudson Insurance Company	Introduction to Crop Insurance-2020 and Succeeding Years	P&C	12	NAIC uniform submission offering an Introduction to Crop Insurance
471472889	8/23/2019	Pacific Life-Individual	Estate Planning and Life Insurance Strategies	Life	1	NAIC uniform course submission covering the changes in estate planning.
619121332	8/26/2019	CEU Institute, Inc	Commercial Property Workshop (3hr)	P&C	3	Course covers discussion and practical application of the ISO Commercial Property coverage forms.
3178943129	8/26/2019	Quest CE Solutions	Variable Index Annuities	Life	1	NAIC uniform submission covering Variable Index Annuities
1108204874	8/27/2019	Pacific Life-Retirement Solutions Division	Client Conversations: Creating Lifetime Income	Life	1	Course addresses key points of retirement income planning including history and moving into complex situations. Considerations include spending surprises, tough choice and do-overs.
3419036323	8/27/2019	Nationwide Life Insurance	Update on Current Developments Affecting Retirement Plans	Life	1	NAIC Uniform submission covering current developments affecting retirement plans.
3741085109	8/28/2019	Nationwide Life Insurance	DOL Investigations of Retirement Plans	Life	1	Course covers the Employee Benefits Security Administration and the types of investigations they initiate.
782246893	8/29/2019	CLM Group, Inc., dba Claims & Litigation Management Alliance	2019 Cyber Management & Professional Liability Committee Webinar	Adjuster	1	Course covers defense strategies for traditional and emerging sources of Insurance producer E&O Exposures.

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2571536486	8/29/2019	National Association of Public Insurance Adjusters	2019 First Party Claims Conference - Days 2&3	Adjuster	12	This course is designed for experienced insurance adjusters, public adjusters, attorneys and others who wish to gain current information related to first party property insurance coverage.
1581549828	8/29/2019	Stewart Title Guaranty - Missoula Office	IT REALLY HAPPENED	Ethics	1	The course offers real situations involving fraud, forgery, elder abuse among others and what patterns and issues arouse with each situation.
3036201583	8/29/2019	NAU Country Insurance Company	2020 Perennial Crop Update	P&C	5	NAIC uniform submission covering agent training for perennial crops.
1610518849	8/30/2019	Versicat ITU, LLC dba AdjusterPro	Montana 1-Hour Legislative Updates	MT Legislative Changes	MT Legislative Changes: 1	The course addresses legislative changes to Montana insurance statutes. Discusses 2019 legislative House bill 62, 64, 65, 66, 85, 91, 92, 382, 515, 578, and Senate bill 55, 240, 305, 335.
4088071042	9/3/2019	ACUITY, a Mutual Insurance Company	CLASSROOM AGENCY ETHICS	Ethics	Ethics: 1	NAIC Uniform submission, 1 classroom ethics credit approved by Wisconsin. Discusses ethics in business entity and insurer interactions, interaction between the insured and business entity with ethics impact, favors, backdating and other requests.

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22541355	9/4/2019	Nationwide Life Insurance Company	The Influence of the States on the Retirement Plan Business (Webinar)	Life	General: 1	NAIC Uniform submission, 1 web-based, classroom credit approved by Ohio. Discusses retirement savings, ERISA pre-emption, state-sponsored retirement plan implementation, and fiduciary standards.
2527650463	9/4/2019	American College (The)	19-112 The 5 C's of Ethical Excellence	Ethics	Ethics: 1	The course addresses ethics. Discusses the principled selling of insurance, personal codes of ethics, legal, ethical easy versus easy, ethical, legal, licensee character, conduct, consistency cooperation and courage.
33367163	9/5/2019	Jackson National Life, Inc.	Going Down the Mountain	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses retirement income, conventional retirement income, safe withdrawal, longevity risk, retirement income structuring, and annuities as part of a retirement plan.

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263278108	9/5/2019	Great West Casualty Company	Commercial Trucking (CT) 4000 - Legal Concerns and Risk Alternatives	Property & Casualty	General: 10	The course addresses property and casualty insurance. Discusses certificates of insurance, insurance contracts and policies, the effect of insured bankruptcy, claims mediation, insurance fraud, errors and omissions exposures, the commercial auto insurance industry, billing options, underwriting, self-insured plans and captive insurance programs.
2084732316	9/6/2019	DF Institute, dba Kaplan Financial	Anti-Money Laundering: Understanding the Problem and Programs to Fight It	Life	General: 2	The course addresses management. Discusses money laundering scope and processes, laws, regulations and reporting requirements, knowing the customer and insurer anti-money laundering programs.
2422007965	9/6/2019	Nationwide Life Insurance Company	The Influence of the States on the Retirement Plan Business	Life	General: 1	NAIC Uniform submission, 1 classroom credit approved by Ohio. Discusses retirement savings, ERISA pre-emption, state-sponsored retirement plan implementation, and fiduciary standards.

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2663592077	9/6/2019	CLM Group, Inc., dba Claims & Litigation Management Alliance	2019 CLM New York Conference	Adjuster	General: 5	The course addresses product knowledge of property and casualty insurance. Discusses claim investigation, extra-contractual exposure, covered versus non-covered damages, claim handling, policy limit demands and insurer obligations, coverages, litigation management, 2019 case law and decisions affecting claims, cannabis claims, risk reduction technology, liability claim bifurcation, molestation claim coverages, and cyber insurance.
4073820255	9/6/2019	WebCE, Inc.	Medicare Coordination with Life Employer Health Plans	Life	General: 4	NAIC Uniform submission, 4 computer-based, self study credit hours approved by Texas. Discusses Medicare basics, Medicare enrollment, employer-based coverage, COBRA and health savings accounts.
1547591157	9/9/2019	National Association of Insurance and Financial Advisors Montana	Ethics for Insurance and Financial Professionals: Questions for Consideration and Discussion - 1	Ethics	Ethics: 1	The course addresses ethics. Discusses operational transparency, acquiring ethical behaviors, professionalism and the framework of ethics.



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3117805191	9/9/2019	National Association of Insurance and Financial Advisors Montana	The Power of Zero	Life	General: 1	The course addresses product knowledge of life and social insurance and annuities. Discusses taxable and tax-deferred investments, retirement deductions, Social Security taxation, tax-free investments, life insurance and two case studies.
3208328757	9/9/2019	National Association of Insurance and Financial Advisors Montana	Estate Planning Topics You May Not Have Heard About	Life	General: 4	The course addresses product knowledge of life insurance and management. Discusses estate planning topics, transfer-on-death deeds, changes in benefits to family members, minor and special-needs children planning, pets and service animals, letters of last instructions, probating a livestock brand, advance medical directive, Montana vehicle title or real property transfer after death, and financial planning for aging parents.
1369091973	9/10/2019	Montana Insurance Education Foundation, Inc.	2019 State of the Montana Insurance Industry	Property & Casualty	General: 1	The course addresses management. Discusses the National Association of Insurance Commissioners, the committees and certification programs of the NAIC and the issues of concern to the Montana Department of Insurance.

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1775042322	9/10/2019	National Alliance for Insurance Education and Research	2019 Ruble Graduate Seminar-PC XLVII	Property & Casualty	General: 16	NAIC Uniform submission, 16 classroom credit hours approved by Texas. Discusses workers' compensation costs, captive insurance, insurance claims, business income insurance, executive risk coverage, and cyber-risk exposures.
3547546768	9/10/2019	Raymond James Insurance Group, Inc. (formerly Planning Corporation of America)	2020 TRUST SCHOOL	Life	General: 1	The course addresses management and product knowledge of life insurance. Discusses fiduciary responsibilities and standards, instructions of the trust creator, account processes, administrative responsibilities, and service to the trust.
872844855	9/11/2019	Land Title Institute	Revised ALTA Policy Forms - What's covered, What's Not?	Title	General: 1	The course addresses product knowledge of title insurance. Discusses material revisions to the 2006 standardized ALTA policies, impacts on other forms, and projected adoption dates for revised policies.
872844855	9/11/2019	Land Title Institute	Mortgage Market Trends in Commercial Real Estate	Title	General: 1	The course addresses product knowledge of title insurance and management. Discusses commercial real estate trends, economic trends, leaseholder and owner ALTA policy endorsements.

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872844855	9/11/2019	Land Title Institute	Lessons from a Former NSA Title Agent		General: 1	The course addresses management. Discusses legal cyber-security requirements, common threats and criminal participants, securing data and data security practices.
872844855	9/11/2019	Land Title Institute	RESPA 411	Title	General: 1	The course addresses product knowledge of title insurance. Discusses the Real Estate Settlement Procedures Act, compliance and enforcement, and best practices in marketing agreements.
3621870306	9/11/2019	Land Title Institute	Keys to Success in a Commercial Transaction	Title	General: 1	The course addresses product knowledge of title insurance. Discusses client expectations, the title agent role, coverage and common commercial endorsements.
3621870306	9/11/2019	Land Title Institute	Yes, There Are Claims in Title	Title	General: 1	The course addresses product knowledge of title insurance. Discusses claim trends, complaint identification, settlement versus title liability, potential claims, underwriting, claim investigation, coverage options, litigation and judgements.

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3621870306	9/11/2019	Land Title Institute	Texas Title Agents Rocking with RON	Title	General: 1	The course addresses product knowledge of title insurance and management. Discusses remote on-line notary (RON), wet signing versus e-recording, in-person versus electronic closings.
872844855	9/11/2019	Land Title Institute	Don't Get Burned: Solar Issues in Title	Title	General: 1	The course addresses product knowledge of title insurance. Discusses residential versus commercial properties with solar panels, types of solar panel ownership, the impact of solar panels of mortgage lending, and title policy endorsements for coverage.
872844855	9/11/2019	Land Title Institute	The Unexpected Benefits of Digital Closings	Title	General: 1	The course addresses product knowledge of title insurance. Discusses the changing role of the title agent at closing, industry digital trends, changes throughout the process and determining success.
872844855	9/11/2019	Land Title Institute	Fraud: Everything Old is New Again	Title	General: 1	The course addresses management. Discusses mortgage fraud trends, fake deeds, property flipping schemes, file documentation and working with law enforcement agencies.

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872844855	9/11/2019	Land Title Institute	Evaluating Technology Investments That Are Right For You	Title	General: 1	The course addresses management and product knowledge of title insurance. Discusses technology trends in the title industry, evaluating technology alternatives and venders, benefits and others experience.
872844855	9/11/2019	Land Title Institute	Wire Fraud Readiness	Title	General: 1	The course addresses management. Discusses wire transfer fraud, methods of access, policies, procedures and training for protection, and reporting wire fraud incidents.
872844855	9/11/2019	Land Title Institute	Preparing for Cyber Attacks	Title	General: 1	The course addresses management and product knowledge of title insurance. Discusses strategic attacks on real estate transactions, wire fraud security measures, client cyber-fraud awareness, cyber-security gaps and litigation and four case studies.
872844855	9/11/2019	Land Title Institute	Marijuana Minefields	Title	General: 1	The course addresses product knowledge of title insurance. Discusses the federal Controlled Substances Act, the pre-emption doctrine in enforcement and prosecution, applicability to the title and escrow industry, and federal legislative updates.

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872844855	9/11/2019	Land Title Institute	Anatomy of a Title Claim	Title	General: 1	The course addresses product knowledge of title insurance. Discusses title claim avoidance, title claim situations, claim issue identification, indemnification and loss coverage, lender's versus owner's policies, and five case study elements.
1283201174	9/11/2019	Prudential Annuities Life Assurance Corporation	Critical Illness and Accident Insurance Fundamentals	Life	General: 1	The course addresses product knowledge of disability insurance. Discusses employer-sponsored voluntary benefit products, accident and critical illness plans, plan underwriting, and plan administration.
2182541480	9/11/2019	Guardian Life Insurance Company of America	Understanding Executive Benefits	Life	General: 2	The course addresses product knowledge of life insurance and annuities. Discusses executive bonus plans, non-qualified deferred compensation plans, plan variations, tax consequences, and appropriate plans.

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869483740	9/11/2019	Prudential Annuities Life Assurance Corporation	Hospital Indemnity Insurance Fundamentals	Life	General: 1	The course addresses product knowledge of disability and casualty insurance. Discusses employer-sponsored products, individual versus group plans, group rating, accident and critical illness plans, plan underwriting, and plan administration.
872844855	9/11/2019	Land Title Institute	Data Privacy Horizon	Title	General: 1	The course addresses management. Discusses data privacy and security, opt-in versus opt-out of privacy rights, European Union directive, state privacy legislation commonality, privacy compliance and consumer requests.
2183838980	9/12/2019	A. D. Banker and Company	AML 1-Hour Refresher-Webinar	Life	General: 1	NAIC Uniform submission, 1 web-based, classroom credit hour approved by Kansas. Discusses money laundering, organizations and laws that regulate money laundering, and prevention of activities.











