

Montana Insurance Continuing Education Advisory Council meeting - October 16, 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>
608711221	9/13/2019	Quest Continuing Education Solutions	Forms of Property and Casualty Liability	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses liability coverage, types of coverage, director's and Officer's, Professional indemnity and medical malpractice coverage, errors and omissions, workers' compensation insurance, and insurer liability claim duties.
1066080332	9/13/2019	ArmTech Insurance Services Inc.	2020 Perennial Agent Update	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Texas. Discusses federal regulation, 2020 crop insurance handbook updates, policy and actuarial changes, new policies and pilot program provisions. Course is scheduled for offering on 10/15, 16, and/or 17/2019.
2713450101	9/13/2019	Alpha Omega Disaster Restoration	Understanding Water Mitigation Processes	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses common property water losses by season, severity of damage, clean versus gray versus black water damages, the claim process, drying procedures and timeframes, and three case studies.

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2724471769	9/13/2019	ALPS (Attorneys Liability Protection Society) Corporation	2019 Montana Insurance Law Update	MT Legislative Changes	MT Legislative Changes: 1	The course addresses insurance law. Discusses changes made to insurance statutes during the 2019 legislative session in House bills 65, 92, 373 and Senate bills 39, and 240.
760942447	9/15/2019	Burns & Wilcox	Kidnap & Ransom Insurance-Webinar	Property & Casualty	General: 1	The course address product knowledge of property and casualty insurance. Discusses definitions and coverages in kidnap and ransom insurance, financial and reputation protection, exposures and risks, extortion, additional coverages and enhancements, and three case studies.
636726782	9/16/2019	National Business Institute, Inc.	Damages in Personal Injury	Property & Casualty	General: 5	The course addresses casualty insurance. Discusses injury suit damages, documenting and quantifying damages, negotiation and damage recovery, litigation and confidentiality.
2035465754	9/16/2019	WebCE, Inc.	Medicare Advantage Plans and Supplemental Benefits	Disability (Health)	General: 2	NAIC Uniform submission, 2 computer-based, self study credit hours approved by Texas. Discusses Medicare basics, Medicare versus Medicare Advantage, supplemental benefits and the Medicare Advantage marketplace.

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2583497956	9/16/2019	ACUITY, a Mutual Insurance Company	JOURNEY INTO PL CYBERLAND	Property & Casualty	General: 1	NAIC Uniform submission, 1 computer-based, self study credit hour approved by Wisconsin. Discusses identity fraud, computer data recovery, cyber extortion phishing, wire fraud and cyber bullying.
4011785222	9/16/2019	CLM Group, Inc., dba 2019 CLM Construction Claims & Litigation Management Alliance	2019 CLM Construction Community Webinar	Adjuster	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses risk transfer, tender letters, limitations of contract language, enforceable tender, additional insureds, contractual indemnification, coverages gaps and tender enforcements.
4284121241	9/16/2019	National Business Institute, Inc.	Damages in Personal Injury Ethics	Ethics	Ethics: 1	The course addresses ethics. Discusses avoiding conflicts of interest, HIPPA and medical record confidentiality requirements and confidentiality protection.
765551934	9/17/2019	CertiTrek	Certified in Long Term Care (CLTC)® Very Short Course	Long Term Care	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Illinois. Discusses long-term care versus extended care, scheduled versus on-demand care, methods to fund long-term care needs, client suitability, and two case studies.

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1979474450	9/17/2019	WebCE, Inc.	Personal Auto Insurance: How Premiums are Determined	Property & Casualty	General: 1	NAIC Uniform submission, 1 computer-based, self study credit hour approved by Texas. Discusses auto insurance rating, class rating, rate regulation, personal auto insurance rating, driver-related factors, vehicle factors, and use-based auto insurance.
3998973819	9/17/2019	One Call Care Management	DVT – What, Why and for How Long	Adjuster	General: 1	The course addresses product knowledge of disability and casualty insurance. Discusses deep vein thrombosis, medical device treatments and products, functionality comparisons, billing codes and DVT prevention technology.
42403109	9/23/2019	Cole, Scott & Kissane, P.A.	How to Successfully Defend Negligent Security Cases	Adjuster	General: 1	The course addresses product knowledge of casualty insurance. Discusses negligent property security issues, naming and describing services and cost of litigation.
2211206358	9/23/2019	Versicat ITU, LLC dba AdjusterPro	Shaking Things Up: Earthquake Adjusting 101	Adjuster	General: 1	NAIC Uniform submission, 1 computer-based, self study credit hour approved by Texas. Discusses earthquake processes and effects, earthquake coverage options, claims and estimates.

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2211206358	9/23/2019	Versicat ITU, LLC dba AdjusterPro	Risky Business: The Basics of Commercial Liability	Adjuster	General: 2	NAIC Uniform submission, 2 computer-based, self study credit hours approved by Texas. Discusses commercial general liability insurance, policy elements, coverages, who and what is covered, professional liability coverage, excess liability and umbrella coverage.
2211206358	9/23/2019	Versicat ITU, LLC dba AdjusterPro	The Nuts & Bolts of Business: Commercial Property & Equipment Breakdown Coverages	Adjuster	General: 2	NAIC Uniform submission, 2.5 computer-based, self study credit hours approved by Texas. Discusses commercial property insurance policy components and coverages, business income coverage and equipment breakdown coverages and exclusions. Recommended for the requested 2 credit hours.
2211206358	9/23/2019	Versicat ITU, LLC dba AdjusterPro	Lies & Liability: Surety, Fidelity, & Commercial Crime	Adjuster	General: 1	NAIC Uniform submission, 1 computer-based, self study credit hour approved by Texas. Discusses commercial crime policy coverages, endorsements and exclusions, government crime coverage, bond types, surety and fidelity bonds.

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2211206358	9/23/2019	Versicat ITU, LLC dba AdjusterPro	FEMA and Flood Insurance: Wading Through Flood Claims	Adjuster	General: 3	NAIC Uniform submission, 3 computer-based, self study credit hours approved by Texas. Discusses the national flood insurance program, rate maps, the Community Rating system, the NFIP standard flood insurance policy and the Write your Own program, dwelling versus residential condominium coverages, adjusting flood claims, federal flood legislation and the role of adjusters.
2554797197	9/23/2019	Montana Insurance Education Foundation, Inc.	Weather Patterns and Modeling	Property & Casualty	General: 2	The course addresses product knowledge of property insurance and management. Discusses the effect of weather on insurance, modeling, hazard, vulnerable locations, mitigation and cost reduction.
2593838712	9/23/2019	CEU Institute, Inc.	Motor Carrier Coverage and Claims (1hr)	Adjuster	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses motor carrier forms, trucker versus motor carrier, third party claims, duty to defend, reservation of rights, non-waiver agreements, insureds, and cargo claims.

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2176537445	9/24/2019	CEU Institute, Inc.	Valuing a Case (1hr)	Adjuster	General: 1	The course addresses management. Discusses claim settlement, and claim valuation in Texas, New York and Florida.
499680680	9/25/2019	WebCE, Inc.	Homeowners Insurance: Factors Impacting Premiums	Property & Casualty	General: 1	NAIC Uniform submission, 1 computer-based, self study credit hour approved by Texas. Discusses homeowners insurance rating principles and factors, policy classes, and rating systems.
1140449007	9/25/2019	CEU Institute, Inc.	Valuing a Case (1hr) Webinar	Adjuster	General: 1	The course addresses management. Discusses claim settlement, and claim valuation in Texas, New York and Florida.
3413342	9/26/2019	Studler, Doyle and Company	Handling Employee Theft - Employee Dishonesty Claims: Expanding on the Basics	Adjuster	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Oklahoma. Discusses ISO and SAA forms, the insured's duties, proof of loss, employee versus independent contractor, creating a claim timeline, claim investigation, limits of liability, impersonal fraud, settlement agreements and three case studies.

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831381034	9/27/2019	Prudential Annuities Life Assurance Corporation	Outcome Oriented Planning - The Case for Fixed Indexed Annuities	Life	General: 1	The course addresses product knowledge of annuities. Discusses benefits of a fixed indexed annuity, annuity structure, risk and return, market affects, and three case studies.
2531806292	9/27/2019	Delaware Life Marketing, LLC	Manage Retirement Risks to Help Maximize Clients' "Peace of Mind"	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Indiana. Discusses defined benefit versus defined contribution retirement plans, retirement income risks, portfolio allocation, funding options, and exposures.
3072004238	9/29/2019	Pacific Life Insurance - Retirement Solutions Division	Elements of Value - How Advisors Can Use Insured Solutions to Add Alpha	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses qualified longevity annuity contracts, charitable giving, risk exposure, and consumer bias.
2151960442	9/30/2019	National Association of Insurance and Financial Advisors Montana	There is More to Life	Life	General: 1	The course addresses product knowledge of life insurance. Discusses life insurance accelerated benefit riders, living benefits, use and function of riders, and one case study.

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4189880780	9/30/2019	CEU Institute, Inc.	Motor Carrier Coverage and Claims (1hr) Webinar	Adjuster	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses the federal 1935 Carmack amendment, third party claims, insureds, cargo claims, time limits on a claim, valuation versus insurance and burden of proof.
139780100	10/1/2019	Montana Land Title Association	MLTA 2019 Fall Ed - Wednesday	Title	General: 2	The course addresses management. Discusses cyber security, types of cyber threat, information technology security risks, and developing an internal response plan.
139780100	10/1/2019	Montana Land Title Association	MLTA 2019 Fall Ethics	Ethics	Ethics: 2	The course addresses ethics. Discusses unethical workplace behavior, codes of ethics, professional ethics, legal versus right, integrity and examples of unethical behaviors.
139780100	10/1/2019	Montana Land Title Association	MLTA 2019 Fall Ed - Tuesday	Title	General: 8	The course addresses product knowledge of title insurance. Discusses railroad rights of way, extra-hazardous risk lands, contracts for deed, policy endorsements, underwriting, and claims.

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3107339116	10/2/2019	CEU Institute, Inc.	Foot and Ankle Injuries Including Plantar Fasciitis (1hr) Webinar	Adjuster	General: 1	The course addresses product knowledge of casualty and disability insurance. Discusses injuries to and resulting pain in and treatment of feet and ankles.
44183538	10/4/2019	Professional Liability Underwriting Society (PLUS)	2019 PLUS Conference IX: Management & PL Markets Today	Property & Casualty	General: 1	The course addresses management. Discusses changes in the insurance marketplace, price increase trends, capacity reductions, and movement of liability to the excess market.
44183538	10/4/2019	Professional Liability Underwriting Society (PLUS)	2019 PLUS Conference VIII: Dude, Prepare for Legalization: Cannabis & Professional Liability	Property & Casualty	General: 1	The course addresses product knowledge of casualty insurance. Discusses underwriting cannabis and hemp, regulatory differences, types of claims, cannabis risk and coverages versus hemp risk and coverages.
44183538	10/4/2019	Professional Liability Underwriting Society (PLUS)	2019 PLUS Conference VII: Transactional Risk: The Evolution of R&W Insurance	Property & Casualty	General: 1	The course addresses product knowledge of casualty and surety insurance. Discusses representations and warranties, claim trends, underwriting, and industry trends.
44183538	10/4/2019	Professional Liability Underwriting Society (PLUS)	2019 PLUS Conference VI: It's All About the Intangibles: Intellectual Property Risk Management	Property & Casualty	General: 1	The course addresses product knowledge of casualty insurance. Discusses tangible versus intangible business assets, information assets, valuation of the risk and risk management.

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44183538	10/4/2019	Professional Liability Underwriting Society (PLUS)	2019 PLUS Conference V: Pardon My Interruption (EPL)	Property & Casualty	General: 1	The course addresses product knowledge of casualty insurance. Discusses employment practices liability, medical marijuana use by employees, allowable pre-employment screening, Equal Employment Opportunity Commission requirements, biometric privacy information act and ADA website compliance.
44183538	10/4/2019	Professional Liability Underwriting Society (PLUS)	2019 PLUS Conference IV: CCPA is coming....Should You Be Scared?	Property & Casualty	General: 1	The course addresses management. Discusses the California Consumer Privacy Act, insurance ramifications, business compliance, and enforcement.
44183538	10/4/2019	Professional Liability Underwriting Society (PLUS)	2019 PLUS Conference II: Side A: Still Free Money?	Property & Casualty	General: 1	The course addresses product knowledge of casualty insurance. Discusses directors and officers liability insurance, Side A direct coverage and indemnification, policy pricing, claims and settlements.
44183538	10/4/2019	Professional Liability Underwriting Society (PLUS)	2019 PLUS Conference I: War, Huh! What is the War Exclusion Good For?	Property & Casualty	General: 1	The course addresses product knowledge of casualty insurance and management. Discusses cyber risk, specific cyber terrorism attacks and methodologies, cyber policy war and terrorism exclusions, underwriting cyberwarfare, indirect or collateral losses and three case studies.

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480890209	10/4/2019	Principal Life-Individual	Social Security - Beyond the Basics	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Iowa. Discusses Social Security eligibility, taxation, survivors benefits, windfall elimination, dependent benefits and spousal benefits.
2962609447	10/4/2019	Montana State Compensation Insurance Fund	November 2019 Policy Services Quarterly Professional Development Meeting	Property & Casualty	General: 4	The course addresses product knowledge of presumptive disease in firefighters, the effect of independent contractor exemption certificates on workers' compensation benefits, correct coding of insurance benefit claims, compensation audit reports and return to work.
2997138319	10/4/2019	Voya Insurance and Annuity Company	Enrollment Technology Overview	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Iowa. Discusses benefit administration, the group insurance market, member enrollment and determining the correct solution for a client (employer).
3292822203	10/4/2019	Principal Life-Individual	Social Security: Get What's Life Yours		General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Iowa. Discusses evaluating Social Security benefits, full retirement age and claiming benefits, benefit taxation spousal benefits and one case study.

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4291204640	10/4/2019	Delaware Life Marketing, LLC	Three Distribution Blind Spots to Watch Out For	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Indiana. Discusses estate planning tax consequences, accumulation and distribution taxation, insufficient guaranteed income, and Social Security holes and annuities as bridge income.
1530496488	10/5/2019	Voya Insurance and Annuity Company	Voluntary Products: An Evolution	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Iowa. Discusses components of voluntary benefits, the use of voluntary options in group benefits, and the effect of voluntary benefits.
1189413434	10/7/2019	Principal Life-Individual	Benefit Administration Systems - Easily Manage Insurance Benefits	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Iowa. Discusses benefit system management, employer and employee benefits of management, choosing a benefit administrator, types of services and system implementation.
2915165437	10/7/2019	CGB Diversified Services Inc	2020 Spring MPCU Update	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Illinois. Discusses multi-peril crop insurance program integrity, program modification for 2020, operational updates and regional commodity program options and endorsements.

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2915165437	10/7/2019	CGB Diversified Services Inc	2020 Spring MPCU Update Webinar	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Illinois. Discusses multi-peril crop insurance program integrity, program modification for 2020, operational updates and regional commodity program options and endorsements.
3508325543	10/7/2019	First American Title Company of Montana, INC.	2019 Montana Legislative Changes	MT Legislative Changes	MT Legislative Changes: 1	SAO-developed course
4149946898	10/7/2019	DF Institute, dba Kaplan Financial	Problematic Beneficiary Designations, 3rd Edition	Life	General: 4	NAIC Uniform submission , 4 computer-based, self study credit hours approved by Illinois. Discusses life insurance and annuity beneficiary designations, common beneficiary designation problems, retirement account beneficiaries and three case studies.
323680879	10/8/2019	PayneWest Insurance, Inc.	Errors and Omissions with Scott Stearns	Property & Casualty	General: 1	The course addresses product knowledge of casualty insurance. Discusses the need for errors and omissions coverage, professional negligence, failure to communicate with an insured, failure to procure the requested coverage(s), file documentation, and four case studies.

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469324081	10/8/2019	Professional Liability Underwriting Society (PLUS)	2019 PLUS CONFERENCE III: CLAIM DYNAMICS: WHY ARE THINGS SO DIFFICULT NOW?	Property & Casualty	General: 1	The course addresses product knowledge of management and casualty insurance. Discusses current claims issues, the factors in processing and litigation changes, processes and difficulties to expect.
906627559	10/8/2019	Producers AG Insurance Company, dba PROAG	2020 Spring Agent Update Webinar	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Texas. Discusses federal form requirements, changes to the 2020 handbooks, spring crop provisions, actuarial changes and the standard reinsurance agreement.
906627559	10/8/2019	Producers AG Insurance Company, dba PROAG	2020 Spring Agent Update	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Texas. Discusses federal form requirements, changes to the 2020 handbooks, spring crop provisions, actuarial changes and the standard reinsurance agreement.
3993325174	10/8/2019	CEU Institute, Inc.	Defending Coverage and Bad Faith Claims in Today's World (6 hours)	Adjuster	General: 6	The course addresses product knowledge of casualty insurance. Discusses coverage actions, coverage and extra-contractual actions, first- and third-party claims, bad faith claims, personal injury coverage cases, Restatement of the Law, Liability Insurance document, and sexual abuse coverage.

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386793337	10/9/2019	CEU Institute, Inc.	Respiratory Care in the Acute Rehab Setting (1hr) Webinar	Adjuster	General: 1	The course addresses product knowledge of disability insurance and management. Discusses respiratory function analysis, short- and long-term respiratory goals, the effect of spinal cord injury on respiratory failure, mechanical ventilation and blood gas management, electric diaphragm stimulation, complications and non-invasive ventilation options.
487293387	10/9/2019	Society of Financial Service Professionals	56th Annual NAEPC Advanced Estate Planning Strategies Conference	Life	General: 17	NAIC Uniform submission, 17 classroom credit hours approved by Pennsylvania. Discusses life settlement, estate planning, trustee selection, defensible appraisal of gifts and estates, gift splitting, QTIPs and valuation, life insurance, wealth transfer methods, planning for minor care, trust management, and charitable giving.
1204192669	10/9/2019	First American Title Insurance Company	Quarterly Roundup - Fraud: What was Old is New Again	Title	General: 1	The course addresses product knowledge of title insurance and management. Discusses fraud in the title industry, hijacking entities and foreclosures, loan slamming, suspicious releases and reconveyances, and financial exploitation of seniors.

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2234794855	10/9/2019	NAU Country Insurance Company	2020 Spring MPCU Update -Property & Casualty 4	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Minnesota. Discusses 2020 multi-peril crop insurance program and handbook changes, farm bill implementation, application forms and deadlines actual production history, acreage reporting, actuarial changes, region-specific plans, billing and claims.
2851259456	10/9/2019	Pilot Catastrophe Services, Inc.	Property Customer Service Adjuster I	General: 1	The course addresses management and marketing. Discusses tangible and intangible client impressions of service, inspection estimates, estimate explanation, catastrophe service and claim packs, and setting client expectations.
3859585346	10/9/2019	NAU Country Insurance Company	2020 Spring MPCU Update -Property & Casualty 6	General: 6	NAIC Uniform submission, 6 classroom credit hours approved by Minnesota. Discusses 2020 multi-peril crop insurance program and handbook changes, farm bill implementation, application forms and deadlines actual production history, acreage reporting, actuarial changes, region-specific plans, billing and claims.

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3927246428	10/10/2019	Great American Insurance Company - Crop Insurance Division	2020 MPC I SPRING UPDATE	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Ohio. Discusses 2020 changes for the crop insurance program, Great American Insurance crop insurance products, federal requirements, claims and compliance, and handbook updates.
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