

Insurance Continuing Education Advisory Council meeting - December 18, 2019

Transaction Number	Transaction Date	Provider Name	Course Name	Course Group	Credits	Course Summary
37X4626303	11/15/2019	National Alliance for Insurance Education and Research	2019 Ruble Graduate Seminar-PC LV	Property & Casualty	General: 16	NAIC Uniform submission, 16 classroom credit hours approved by Texas. Discusses catastrophe losses, drone risks and exposures, crime insurance, and employment practices liability insurance. d 12/12-13/19
86X4861986	11/16/2019	InsuranceStudy.com	Identity Theft Programs: Unmasking the Complexities	Property & Casualty	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Illinois. Discusses insured versus non-insured identity theft programs, comprehensive coverage review, identity theft programs as an employee benefit, the policy and exclusions.

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86X4861986	11/16/2019	InsuranceStudy.com	The Dark Web & Your Digital Footprint	Property & Casualty	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Illinois. Discusses elements of the world wide web, how and why each is used, anonymous browsers in the Dark Web, cyber anonymity, ransomware versus extortionware versus malware, protecting client information, identity protection insurance and products.
2588623833	11/18/2019	Rural Community Insurance Company	2020 Federal Crop Agent Spring CE	Property & Casualty	General: 4	The course addresses product knowledge of property and casualty insurance. Discusses federal program updates, 2020 handbook revisions, program actuarial updates, program compliance requirements, claims, prevented planting and RCIS private products.

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1665712022	11/19/2019	American Institute for CPCU (formerly AICPCU/Insurance Institute of America)	ARM 401 - Holistically Assessing Risk	Property & Casualty	General: 14	NAIC Uniform submission, 14 text-based, self study credit hours approved by Pennsylvania. Discusses risk identification and analysis, risk modeling and big data, hazard and cyber risks, operational risk, social media and reputation risk, financial and supply chain risk, and the elements that affect each.
2706304698	11/19/2019	American Institute for CPCU (formerly AICPCU/Insurance Institute of America)	ARM 402 - Successfully Treating Risk	Property & Casualty	General: 12	NAIC Uniform submission, 12 text-based, self study credit hours approved by Pennsylvania. Discusses methods to treat risk, intellectual property risk, fleet risk, legal and regulatory risk, operational and financial risk, and strategic risk in business insurance.

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3052774533	11/19/2019	American Institute for CPCU (formerly AICPCU/Insurance Institute of America)	ARM 400 - Risk in an Evolving World	Property & Casualty	General: 11	NAIC Uniform submission, 11 text-based, self study credit hours approved by Pennsylvania. Discusses risk classifications, pure versus speculative risk, diversifiable versus non-diversifiable risk, risk management processes, business process management, internal controls, risk management compliance and organizational resilience.
92X5238219	11/20/2019	Quest Continuing Education Solutions	Claims-Made Policy Training	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses claims-made versus occurrence policies, professional liability insurance, coverage, commercial general liability, directors and officers liability coverage, coverage triggers, aggregates and supplementary payments.

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3847228835	11/20/2019	CEU Institute, Inc.	Only Pay Claims You Owe (1hr) Webinar	Adjuster	General: 1	The course addresses product knowledge of disability and casualty insurance and management. Discusses spinal anatomy and spinal injury analysis, disc disease, degenerative disease, injury indicators and five case studies.
3847228835	11/20/2019	CEU Institute, Inc.	Only Pay Claims You Owe (1hr)	Adjuster	General: 1	The course addresses product knowledge of disability and casualty insurance and management. Discusses spinal anatomy and spinal injury analysis, disc disease, degenerative disease, injury indicators and five case studies.

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3257334558	11/21/2019	Allcat Claims Service, dba ACS Training	Earthquake Claim Handling Certification	Adjuster	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses investigating earthquake claims, scope of loss determination, earthquake intensity maps, fair claim handling, property examination, CUREE Consortium of Universities for Research in Earthquake Engineering) guidelines, occupant questionnaire, inspection checklists for various parts of a building, building codes, hidden damages, business interruption, additional living expenses, damage to concrete and subsequently discovered damage and fracking claims.
3257334558	11/21/2019	Allcat Claims Service, dba ACS Training	Adjuster Fundamentals	Adjuster	General: 8	NAIC Uniform submission, 8 classroom credit hours approved by Texas. Discusses claim file documentation, Xactimate basics, homeowner policies, elements of exterior and interior damage inspection, damage diagrams, consistency, date and cause of loss.

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3257334558	11/21/2019	Allcat Claims Service, dba ACS Training	The Insurance Market	Adjuster	General: 2	NAIC Uniform submission, 1 classroom credit hour approved by Texas. Discusses terminology, protective terminology in the insurance industry, claim closure, and settlement explanations.
2467036108	11/22/2019	Broker Educational Sales and Training, Inc	ESTATE PLANNING	Life	General: 20	The course addresses product knowledge of life insurance and annuities. Discusses real versus personal property, property ownership and transfer, probate and wills, Federal estate tax and calculation, types of trusts, asset protection planning, and charitable giving.

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4145989466	11/22/2019	Broker Educational Sales and Training, Inc	4-Hour Long Term Care Insurance	Long Term Care	General: 4	The course addresses product knowledge of life and disability insurance. Discusses long-term care services and facilities, Medicare, Medicare services, hospitalization, Advantage plans, prescription drug insurance, Medigap policies, Medicaid, long-term care policy provisions, long-term care partnership policies, and funding alternatives.
4228193432	11/22/2019	Broker Educational Sales and Training, Inc	4-Hour Annuity Training Course	Annuity Suitability	General: 4	The course addresses product knowledge of life insurance and annuities. Discusses annuity basics, fixed versus variable annuities, fixed index annuities, parties to a contract, unfair marketing practices and suitability.

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1985066481	11/23/2019	Broker Educational Sales and Training, Inc	Retirement Planning	Life	General: 21	The course addresses product knowledge of life insurance and annuities. Discusses retirement income needs and risk, managing retirement income, withdrawal rate safety, retirement income sources, Social Security and maximizing benefits, employer-sponsored programs, 401(k) plans, IRAs, qualified retirement plans, annuities in retirement plans, healthcare in retirement, Medicare, long-term care, and reverse mortgages.
73X7256855	11/25/2019	Broker Educational Sales and Training, Inc	The Advisors Guide to Social Insurance Programs	Life	General: 20	The course addresses product knowledge of social insurance. Discusses old age supplemental disability insurance, old age retirement benefits, auxiliary Social Security benefits, maximizing benefits, Social Security disability, Medicare, Medicare Advantage, supplemental policies, and Medicaid.

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2649678815	11/26/2019	Broker Educational Sales and Training, Inc	The Advisors Guide to 401(k) Plans	Life	General: 13	The course addresses product knowledge of life insurance and annuities. Discusses 401(k) plan evolution, qualification requirements, plan contribution, nondiscrimination classification and contribution rules, safe harbor, combination plans, distributions and fiduciary responsibilities.
90537636	11/27/2019	American Farm Bureau Insurance Services, Inc.	2020 Ethic Training (adjuster)	Ethics	Ethics: 2	The course addresses ethics. Discusses moral responsibilities, principles, rule bending, ethical concerns, consumer protection laws, and consumer expectations.
90537636	11/27/2019	American Farm Bureau Insurance Services, Inc.	2020 Adjuster Training	Adjuster	General: 12	The course addresses product knowledge of property and casualty insurance. Discusses quality control, federal regulatory requirements, the loss adjustment manual, crop provisions, conservation activities, acreage report verification, American Farm Bureau website, farm-stored production, co-mingled production.

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77X7286737	11/29/2019	Broker Educational Sales and Training, Inc	The Advisors Guide to Social Security Benefits	Life	General: 8	The course addresses product knowledge of social insurance. Discusses the purpose of the Social Security program, types of benefits, calculating benefits, when to apply, benefit maximization, Medicare, Medicare Part D, Social Security disability, and potential program reform.
1075366883	11/29/2019	Bison Mountain Financial	Long Term Care Insurance Update	Long Term Care	General: 4	NAIC Uniform submission, 4 web-based, classroom credit hours approved by Arizona. Discusses long-term care terminology, activities of daily living versus custodial care, types of facilities, the effect of Medicaid on long-term care services, asset spend down, policies and policy features, group versus individual policies, long-term care partnership programs and policies, policy underwriting and suitability.

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1075366883	11/29/2019	Bison Mountain Financial	Ethical Principles	Ethics	Ethics: 2	NAIC Uniform submission, 2 web-based classroom ethics credit hours approved by Arizona. Discusses attribution of behaviors, moral licensing, standards of morality, discrimination, implicit bias, ethical oversights and ethical mistakes.
2003866607	11/29/2019	Broker Educational Sales and Training, Inc	The Advisors Guide to IRAs	Life	General: 13	The course addresses product knowledge of annuities. Discusses individual retirement accounts, types of IRAs, Simplified Employee Pension plans, IRA roll over, distributions, beneficiary planning, Roth IRAs, creditor protection, and Coverdale educational accounts.

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2628550434	12/2/2019	Broker Educational Sales and Training, Inc	The Advisors Guide to Annuities and Ethical Practices	Life	General: 12	The course addresses product knowledge of life insurance and annuities. Discusses definitions, annuity classification, fixed and fixed index annuities, variable annuities, taxation of annuities, parties to the contract, and contract structure.
2628550434	12/2/2019	Broker Educational Sales and Training, Inc	The Advisors Guide to Annuities and Ethical Practices - Ethics	Ethics	Ethics: 3	The course addresses ethics. Discusses definitions, ethical decision-making, ethical responsibilities of the producer, insurer and policy owner, laws and principles, waiver and estoppel, unfair trade practices, marketing practices, and navigating dilemmas.
4291369891	12/3/2019	Rural Community Insurance Company	2020 Federal Agent Crop Spring CE Update	Property & Casualty	General: 5	The course addresses product knowledge of property and casualty insurance. Discuss federal program updates, general standards, crop insurance and written agreement handbook updated for 2020, actuarial and claims updates, and new RCIS system updates.

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4126391438	12/5/2019	National Association of Insurance and Financial Advisors Montana	HIPAA Compliance or Ethical Responsibility. What Comes First	Ethics	Ethics: 1	The course addresses ethics. Discusses HIPPA privacy protection national standards, ethical responsibilities, covered entities, breach of privacy notification, client expectations, and non-compliance.
66538214	12/6/2019	Insurance Career Training Inc., dba Direct CE	Montana Legislative Update 2019	MT Legislative Changes	MT Legislative Changes: 1	The course addresses insurance law. Discusses changes made during the 2019 legislative session to 33-1-305, 33-1-604, 33-1-605, 33-1-606, 33-1-613, 33-1-1302, 33-2-104, 33-2-115, 33-2-301, 33-2-302, 33-2-307, 33-2-315, 33-2-714, 33-2-1106, 33-2-1701, 33-6-102, and 33-6-103, Montana Code Annotated.

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2159609547	12/6/2019	Rural Community Insurance Company	2020 Spring Agent Federal Crop Meeting	Property & Casualty	General: 7	The course addresses property and casualty insurance. Discusses 2020 federal program changes, crop insurance handbook and general standards handbook updates, 2020 written agreements, claims, margin protection, precision farming, prevented planting, actuarial updates, and uninsurable production reporting.
3672338197	12/6/2019	One Call Care Management	Home Accessibility - Innovation to Modification	Adjuster	General: 1	The course addresses management and product knowledge of casualty and disability insurance. Discusses durable medical equipment, mobility products and home modifications following catastrophic injury, home access, determining modifications, short-versus long-term solutions and one case study.

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83X8180024	12/10/2019	International Foundation of Employee Benefit Plans	Health Benefits Conference and Expo	Disability (Health)	General: 12	NAIC Uniform submission, 12 credit hours approved by Wisconsin. Discusses employee health and wellness benefits, program sustainability, functional medicine, health and welfare plans, benefit compliance obligations, mental health, workplace wellness and benefit discrimination.
1003139550	12/10/2019	DF Institute, dba Kaplan Financial	Needs Analysis, 5th Edition	Life	General: 8	NAIC Uniform submission, 8 computer-based, self study credit hours approved by Illinois. Discusses life insurance needs, Social Security, needs analysis, other life insurance planning, and five case studies.
1156340639	12/10/2019	Sigco, Inc. dba Pohs Institute	Financial Strategies, DOL Updates & Ethics	Life	General: 20	The course addresses product knowledge of life insurance and annuities. Discusses financial planning, asset allocation, investment fundamentals, comparing plan types, risk tolerance, debt, insurance versus high bred products, senior needs, retirement planning and estate planning.

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1156340639	12/10/2019	Sigco, Inc. dba Pohs Institute	Financial Strategies, DOL Updated & Ethics (Ethics)	Ethics	Ethics: 3	The course addresses ethics. Discusses financial planning legal and ethical responsibilities, ethical insurance communication, fiduciary responsibilities, agent liability, ethical practices, needs analysis and discrimination in insurance.
1281195916	12/10/2019	Hartford Fire Insurance Company	5 Day Small Business Training Program	Property & Casualty	General: 22	NAIC Uniform submission, 22 classroom credit hours approved by Connecticut. Discusses special property coverage form, business liability coverage form, commercial auto, coverages, limitations, insureds, property not covered, claims-made versus occurrence forms, employment practices liability and workers' compensation.
1691471772	12/10/2019	DF Institute, dba Kaplan Financial	Personal Auto Coverage, 6th Edition	Property & Casualty	General: 5	The course addresses product knowledge of property and casualty insurance. Discusses personal auto policy elements, definitions and insuring agreement, coverages, endorsements, no-fault plans and premiums.

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3118322749	12/10/2019	DF Institute, dba Kaplan Financial	FIC Intermediate Course: Needs Analysis, 5th Edition	Life	General: 8	The course addresses product knowledge of life insurance. Discusses life insurance needs, Social Security, needs analysis, other life insurance planning, and five case studies.
3718249180	12/10/2019	Northstar Educational Services	Personal Umbrella Insurance	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses catastrophic losses, claims and lawsuits, underlying policies, exclusions, conditions, exposures, and underwriting.
4272486555	12/10/2019	Northstar Educational Services	Personal Automobile Insurance	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses victim compensation, tort liability, financial responsibility laws, compulsory insurance, DICE (declarations, insuring agreement, conditions, exclusions) coverage determination, elements of personal automobile policies, and optional endorsements

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1446647884	12/11/2019	Quest Continuing Education Solutions	Strategies to Manage Retiree Life Liabilities	Life	General: 1	The course addresses product knowledge of life insurance. Discusses retiree group term life insurance, retiree life insurance liabilities, funding strategies, buyouts, employer-paid retiree life insurance as deferred compensation, and transferring the liability,
1511133274	12/11/2019	ArmTech Insurance Services Inc.	2020 Spring Adjuster Update	Adjuster	General: 16	The course addresses product knowledge of property and casualty insurance, federal regulations, actuarial provisions, handbook updates, loss adjustment manual, double cropping, quality control, standards for large claims, prevented planting, insured "person" types, code of conduct and ethics.

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1538938378	12/11/2019	CEU Institute, Inc.	HCAA 2020 Executive Forum	Life	General: 10	The course addresses product knowledge of disability and life insurance. Discusses Health Care Administrators Association concerns, healthcare in America, high-performance health plans, employers and health plans, redesigning health plans, risk strategies and ambulatory surgical centers.
1006590292	12/12/2019	Farmers Mutual Hail Insurance Company of Iowa	2020 MPCCI Spring Update - Webinar	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses commingled production, farm-stored production, multi-county enterprise units and endorsements, and insured versus uninsured acreage.
1040950431	12/12/2019	Lincoln National Life Insurance Company/Connecticut	The Annuities Evolution: What's Old. What's New. Are Your Clients Missing Out?	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses annuity evolution, income accumulation, annuity market trends, living benefits, features and benefits.

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2422383077	12/12/2019	Rural Community Insurance Company	2020 Federal Crop Insurance Adjuster Training	Property & Casualty	General: 16	The course addresses product knowledge of property and casualty insurance, federal regulations, actuarial provisions, handbook updates, loss adjustment manual, double cropping, quality control, standards for large claims, prevented planting, insured "person" types, code of conduct and ethics.
2608392686	12/12/2019	Allianz Life Financial Services LLC	Six Impactful Tax and Jobs Act Strategies	Life	General: 1	The course addresses product knowledge of life insurance. Discusses Roth IRA conversion, qualified charitable contributions, gifting by bunching, qualified business deduction planning and accelerated IRA withdrawals.
4193764257	12/12/2019	Quest Continuing Education Solutions	DALBAR Quantitative Analysis of Variable Annuity Investor Behavior	Life	General: 1	The course addresses product knowledge of annuities. Discusses investment behavior, proprietary quantitative analysis, average investor returns and variable annuities versus mutual funds.

Individual Course Submission

12/3/2019

Bobbi Michelson

Workers' Compensation 101, Casualty General: 6
Brown and Carlson Law and
Disability

The course addresses product knowledge of casualty and disability insurance. Discusses the workers' compensation claims process, Minnesota claim form filing requirements, compensability, benefit compensation, and HIPPA issues.