Transaction Number	Transaction Date	Provider Name	Course Name	Course Group	Credits	Course Summary
58X4873789	12/13/2019	Allianz Life Financial Services LLC	Retirement Drawdown	Life	General: 1	The course addresses product knowledge of life insurance. Discusses individual retirement arrangements, asset mixes, retirement income risks, beneficiary needs, charitable planning strategies and net unrealized appreciation.
1315783837	12/13/2019	Stewart Title Guaranty - Missoula Office	ESCROW INSTRUCTIONS CLAIMS RELATED TO ESCROW FAILURE	Title -	General: 1	The course addresses product knowledge of title insurance. Discusses parties to escrow, duties and limitations, lender instruction review, claims and title claims resulting from poor escrow choices.

3443843118	12/13/2019	Delaware Life Marketing, LLC	The Tax Journey: Accumulation to Wealth Transfer	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Indiana. Discusses tax deferral through wealth accumulation, minimizing retirement taxation, and beneficiary planning.
4203514062	12/13/2019	National Underwriter Company	Navigating Your Yacht Insurance	Property & Casualty	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses marine insurance, coverages, navigational limits, captain and crew members, tender, yacht, warranties, seaworthiness exclusions, lifestyle and marine exposures.

common claim issues.

2020 Spring NAU Country Adjuster General: 16 NAIC Uniform submission, 16 11X3258054 12/16/2019 Insurance Company **Adjuster Training** classroom credit hours approved by Minnesota. Discusses 2020 changes, basic policy and crop policy provisions, unit structure, General Standards and Loss Adjustment Manuals, soybean, small grain, corn and regional crop adjustment standards, yield reports, plans of insurance and

2468467802 12/16/2019 Montana Insurance Miscellaneous Property & General: 6 The course a knowledge of the course o

The course addresses product knowledge of property and casualty insurance. Discusses pollution exposures, liability and risk management, coverage for pollution in standard insurance policies, farm property and liability endorsements, commercial general liability coverage, directors and officers liability, employment practices loss exposures, fiduciary liability, commercial crime insurance and crime policy exclusions.

2715364785	12/17/2019	PPG Industries, Inc.	Vehicle Pre- Inspection for Insurers	Property & General: 3 Casualty	The course addresses product knowledge of property and casualty insurance. Discusses inspection prior to offering coverage, client and insurer benefits of pre-inspection, fraud reduction, the pre-inspection process, what and where to inspect, proper repair parts and one case study.
1162562441	12/18/2019	WebCE, Inc.	Getting to Yes on Your Commercial Lines Submissions	Property & General: 5 Casualty	NAIC Uniform submission, 5 computer-based, self study credit hours approved by Texas. Discusses the roles of the buyer, producer and underwriter in the commercial lines process, the submission, agency underwriting, determining exposures, liability limits, deductibles, workers' compensation, umbrella policies

and underwriter review.

3071294412	12/18/2019	The McGowan Companies	Active Shooter Workplace Violence – Claims, Coverages and Consequences	Property & Casualty	General: 2	The course addresses product knowledge of property, casualty and disability insurance. Discusses three case studies, review of past events and claims, exposures, duty of care versus duty to defend, coverages and risk.
3611514170	12/18/2019	CEU Institute, Inc.	Low Impact Soft Tissue (LIST) Auto Claims (1hr) Webinar	Adjuster	General: 1	The course addresses product knowledge of casualty and disability insurance. Discusses covered autos, liability coverage, policy definitions, employee indemnification, employer's liability, common soft tissue injuries, risk factors, treatment techniques and claim analysis.

2653255970	12/19/2019	Scully Health Management, Inc.	Prescription Medication and the negative effects on oral health	Adjuster	General: 1	The course addresses product knowledge of disability and casualty insurance. Discusses the effect of analgesics on pain, reduced oral gland secretions and dental evaluation.
2169068825	12/20/2019	CEU Institute, Inc.	2020 Themis Advocates Group Annual Conference	Adjuster	General: 6	The course addresses product knowledge of property and casualty insurance. Discusses claim technologies, medical billing evidence, cell phone forensics, mitigating risk, and workplace violence claims.

2414771661	12/20/2019	Modern Woodmen of America	Investment Training School	Life	General: 12	The course addresses product knowledge of life insurance and annuities. Discusses needs analysis, current life insurance and annuity distribution taxation, stocks and bonds, types of life insurance and annuities, income planning, and settlement options.	change,
2414771661	12/20/2019	Modern Woodmen of America	Career School	Life	General: 12	The course addresses product knowledge of life insurance. Discusses preparation for client interaction, needs assessment, types of life insurance, conversion and incontestability, annuities, market conduct, underwriting and member services.	name change to Career I School - 19938, currently effective through 10/29/202 1. Terminate former course on approval.

77X3194709	12/22/2019	Consolidated Educational Services, Inc.	Charitable Trusts: Planning Techniques Using Life Insurance	Life	General: 1	The course addresses product knowledge of life insurance. Discusses charitable lead trusts, terminology, charitable remainder trusts, planning with trusts and trust characteristics.
2206545767	12/23/2019	Pilot Catastrophe Services, Inc.	Property Subrogation	Adjuster	General: 2	NAIC Uniform submission, 2 computer-based, self study credit hours approved by Alabama. Discusses company pursuit of a third-party responsible for a loss, subrogation benefits, legal versus conventional versus statutory subrogation, investigation of loss, issuing notice, liability theories, breach of contract, waivers and resolution.

3131295446	12/23/2019	CE University-
		ceu.com

Introduction to Personal Auto -2nd Edition Property & General: 6 Casualty NAIC Uniform submission, 6 computer-based, self study credit hours approved by Pennsylvania. Discusses requirements for personal auto coverage, liability, medical, uninsured motorist, the personal auto policy, coverage for damage to the insureds' vehicle and duties of an insured following an accident.

1542317530	12/24/2019	Society of Financial Service Professionals	2020 FSP Institute	Life	General: 18	NAIC Uniform submission, 18 classroom credit hours approved by Pennsylvania. Discusses estate planning elements, business liquidity planning, closely-held businesses, qualified domestic relations orders, long-term care coverage, the effect of divorce on estate plans, the commercial cannabis industry, and two case studies.
2936055639	12/29/2019	Allcat Claims Service, dba ACS Training	Adjuster Ethics	Ethics	Ethics: 2	NAIC Uniform submission, 2 classroom ethics credit hours approved by Texas. Discusses fiduciary duty, characteristics of ethical standards, unfair trade practices, and penalties for unethical behavior.

2936055639	12/29/2019	Allcat Claims Service, dba ACS Training	Adjuster Ethics & Expectations	Ethics	Ethics: 1	NAIC Uniform submission, 1 ethics classroom credit hour approved by Texas. Discusses a need for ethics, legal versus ethical behaviors, ethical communication and ethical adjuster behaviors.
2936055639	12/29/2019	Allcat Claims Service, dba ACS Training	Adjuster Prep Class	Adjuster	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses claims handling, house/home claims, automatic deductions, identifying proper coverage, depreciation, live tree debris removal coverage, using Xactimate in adjusting estimates and analyzing a loss.

2936055639	12/29/2019	Allcat Claims Service, dba ACS Training	Adjuster Proclivities	Adjuster	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses property claim adjusting principles, claims handling, adjuster methodologies, and responsibilities.
2936055639	12/29/2019	Allcat Claims Service, dba ACS Training	Characteristics of Ethical Behavior	Ethics	Ethics: 2	NAIC Uniform submission, 2 ethics classroom credit hours approved by Texas. Discusses codes of ethics, fiduciary duties, ethical behavior, good faith and unfair trade practices.

2936055639	12/29/2019	Allcat Claims Service, dba ACS Training	Claim Assist	Adjuster	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses insurer claim guidelines, policy, endorsement and rider content, claim file maintenance, the claim cycle and the effect of claim volume on processing.
2936055639	12/29/2019	Allcat Claims Service, dba ACS Training	Commercial Claims	Adjuster	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses commercial building interior and exterior damage adjustment, commercial roofing, repair and replacement procedures and methods and inspection processes.

2936055639	12/29/2019	Allcat Claims Service, dba ACS Training	Mobile- Manufactured Homes	Adjuster	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Texas. Discusses specialty interior construction in manufactured homes, transportation, delivery and setup considerations, and one case study.
2936055639	12/29/2019	Allcat Claims Service, dba ACS Training	Tile & Wood Roofing	Adjuster	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses types and descriptions of roofing materials, damage types, methods of repair or replacement and claim estimation methods.

3450655880	12/30/2019	Great West Casualty Company	Commercial Trucking (CT) 1000 - Core Transportation Coverages	Property & General: 10 Casualty	NAIC Uniform submission, 10 classroom credit hours approved by Nebraska. Discusses trucking exposures, underwriting, physical damage policy, cargo coverages, motor carrier liability policy, safety programs, occupational accidents, claim fundamentals and legal considerations.
4089859342	12/30/2019	Rural Community Insurance Company	2020 Federal Crop Hail Adjuster Training	Property & General: 4 Casualty	The course addresses product knowledge of property and casualty insurance. Discusses named peril and crop/hail 2020 loss adjustment manual, new crop/hail and named peril products, adjusting specific crop losses and 2020 loss adjustment procedures.

20X6927368	12/31/2019	WebCE, Inc.	Health Reimbursement Arrangements: QSEHRAs, ICHRAs and EBHRAs	Disability (Health)	General: 3	NAIC Uniform submission, 3 computer-based, self study credit hours approved by Texas. Discusses employer-sponsored health benefits, qualified small employer health reimbursement arrangements, individual coverage health reimbursement arrangements, excepted benefit health reimbursement arrangements and benefit coordination.
67X2153629	12/31/2019	Montana State Compensation Insurance Fund	Producer's Academy	Property & Casualty	General: 5	The course addresses product knowledge of disability and liability insurance and management. Discusses workers' compensation policy underwriting, risk management, claim management, and two group exercises.

68X4107562	12/31/2019	Montana State Compensation Insurance Fund	Introduction to Workers Compensation	Property & Casualty	General: 5	The course addresses product knowledge of liability insurance and management. Discusses workers' compensation history, safety risks, types of claims, the Montana Safety Culture Act, and the policy application process.
2033974987	12/31/2019	Allcat Claims Service, dba ACS Training	ADJUSTER ETHICS AND EXPECTATIONS	Adjuster	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Texas. Discusses licensee duties to insureds insurers, proper claim handling and settling, handling subrogation and handling salvage.

82X8332574 1/2/2020 Allcat Claims Service, Claim Review dba ACS Training

Adjuster General: 2

NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses review of claims, carrier guidelines, claim file completion, coverage review, file documentation, prior losses, and review with the insured.

2555287129	1/2/2020	WebCE, Inc.	Montana Insurance Laws: Update 2019	MT Legislative Changes	MT Legislative Changes: 1	The course addresses insurance law. Discusses 2019 changes to insurance statutes in 33-1-1302, 33-2-301, 33-2-302,33-2-315, 33-3-601, 33-6-303, 33-6-401, 33-10-202, 33-10-216, 33-10-227, 33-15-403, 33-16-223, 33-28-101, 33-28-105, 33-28-111, 33-28-201, 33-28-40133-32-102, 33-32-211, 33-32-306, 33-22-1301 through 1322, 61-6-301, 61-6-303, and 72-2-813 Montana Code Annotated.
4049868968	1/2/2020	Allianz Life Financial Services LLC	Navigating the Necessities of RMDs	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses required minimum distributions, distribution taxation, RMD options and strategies, and post- death distributions,

71X1734999	1/3/2020	Stewart Title Guaranty - Missoula Office	Claims, Red Flags, and Problem Files	Title	General: 1	The course addresses product knowledge of title insurance. Discusses claim trends, claim file problems, underwriting assistance and other resources.
71X1734999	1/3/2020	Stewart Title Guaranty - Missoula Office	Endorsements	Title	General: 1	The course addresses product knowledge of title insurance. Discusses the concept of endorsements, availability, forms, using endorsements, and issuing analysis.
71X1734999	1/3/2020	Stewart Title Guaranty - Missoula Office	THE PITFALLS OF INSURING EASEMENTS	Title	General: 1	The course addresses product knowledge of title insurance. Discusses types of easements, appurtenant and reciprocal easements, easements by gross and necessity, implied and prescriptive easements.

71X1734999	1/3/2020	Stewart Title Guaranty - Missoula Office	REVIEWING SURVEYS, NEW PLATS AND OTHER FUN MAPS	Title	General: 1	The course addresses product knowledge of title insurance. Discusses underwriter survey requirements, legal descriptions, encroachments, underlying property search, types of access, plat maps, and condominium maps.
1666574263	1/3/2020	Northstar Educational Services	Social Security Retirement Update	Annuity Suitability	General: 1	The course addresses product knowledge of social insurance. Discusses the history of Social Security and the Social Security Act of 1935, old-age and unemployment insurance, disability and dependent grants, survivor coverage, workers not covered, eligibility, dual benefits and termination of benefits.

2605282276	1/3/2020	Pacific Life - Individual	Non-Qualified Deferred Compensation Plans and Life Insurance	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by California. Discusses tax and benefit implications for employers and employees, life insurance as supplementary funding, non-qualified deferred compensation, pass-through entities, and special considerations.
2817563766	1/3/2020	Montana Insurance Education Foundation, Inc.	E&O: Commercial Property Coverage Gaps and How to Fill Them Part 2	Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses errors and omissions valuation, coverage options, deductibles, time element issues, rental income exposures, business income and extra expense coverage, indemnity periods and inland marine errors and

omissions.

2919751389	1/3/2020	Protective Life Insurance Company	Medicare Made Simple - Help Clients Prepare for Important Decisions Ahead	Life	General: 1	The course addresses product knowledge of social and health insurance. Discusses characteristics of the initial and current plans, program enrollment, program parts, Medicare coverage elements, retirement health insurance costs and planning for retirement healthcare.
3955006044	1/3/2020	Montana Insurance Education Foundation, Inc.	E&O: Commercial Liability Coverage Gaps and How to Fill Them Part 2	Casualty	General: 3	The course addresses product knowledge of casualty insurance. Discusses commercial auto errors and omissions, workers' compensation, excess and umbrella policy errors and omissions, and prevention of errors and omissions situations.

3955006044	1/3/2020	Montana Insurance Education Foundation, Inc.	E&O: Commercial Liability Coverage Gaps and How to Fill Them Part I	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses duties owed, liability for breach of duty owed to insurer or insured, actions that give rise to claims, direct property errors and omissions, business personal property, failure to cover, covered property valuation, actual cash value versus replacement cost and valuation endorsement.	typo
4127987982	1/3/2020	Montana Insurance Education Foundation, Inc.	E&O: Commercial Property Coverage Gaps and How to Fill Them Part 1	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses general agency law, property errors and omissions coverage issues, business personal property, vacancy provisions, inadequate sublimits, and valuation of covered property.	

1295527371	1/6/2020	Montana Insurance Education Foundation, Inc.	Cyber Insurance Deconstructed	Property & General: 2 Casualty	The course addresses product knowledge of property and casualty insurance. Discusses cyber risk, data breaches, hard copy versus digital files, computer networks, direct and indirect breach costs, system security and protections, cyber insurance coverage, and response following a data breach.	
1304260294	1/6/2020	Montana Insurance Education Foundation, Inc.	-	Property & General: 3 Casualty	The course addresses product knowledge of property and casualty insurance. Discusses personal property endorsements, liability endorsements, personal inland marine, and items covered under these endorsements.	typo

1914957851 1	./6/2020	Producers AG Insurance Company, dba PROAG	2020 Adjuster School	Adjuster	General: 16	NAIC Uniform submission, 16 classroom credit hours approved by Texas. Discusses the Federal reinsurance agreement, industry updates, whole farm revenue policies, claims processing, crop hail, crop loss and multi crop forms, replant claims, company reserves, large claims, entity verification, comingled production cause of loss, the 2020 Loss Adjustment Manual, and regional crop specific review.

2643704539 1/6/2020 Montana Insurance

E&O: Roadmap to Property & General: 3 Education Foundation, Homeowner's Endorsements and Inc. Personal Inland Marine Part I

The course addresses product typo knowledge of property and casualty insurance. Discusses insuring condominiums and renters, tenant insurance, named insureds, real property endorsements, and specialty coverages.

Casualty

2713623414	1/6/2020	CEU Institute, Inc.	Obesity's Effect on Treatment and Return to Work (1hr) Webinar	Adjuster	General: 1	The course addresses product knowledge of casualty and disability insurance. Discusses the effect of obesity on medical diagnoses and employers, conditions associated with obesity, return-to-work issues, case manager and adjuster guideline delays, and early intervention.
3077720872	1/6/2020	Pacific Life - Individual	Gone, But Not Forgotten: Legacy Planning Using Life Insurance	Life	General: 1	NAIC Uniform submission 1 classroom credit hour approved by California. Discusses types of and needs for legacy benefits, planning benefits for children versus grandchildren, charitable planning and three case studies.

3143307234	1/6/2020	Montana Insurance Education Foundation, Inc.	•	Property & General: 3 Casualty	The course addresses product knowledge of property and casualty insurance. Discusses perils insured against, exclusions, conditions, liability and general conditions, personal liability, medical payments, medical payments to others and additional coverages.
3397421970	1/6/2020	Montana Insurance Education Foundation, Inc.	•	Property & General: 3 Casualty	The course addresses product knowledge of property and casualty insurance. Discusses homeowner forms, eligibility, named insureds, policy definitions, additional coverages, and property covered by the policy.

3517589900	1/6/2020	Stewart Title Guaranty - Missoula Office	BANKRUPTCY IN RESIDENTIAL REAL ESTATE	Title	General: 1	The course addresses product knowledge of title insurance. Discusses types of bankruptcy, the effects of bankruptcies on property sale, secured judgement liens, mortgages and deeds of trust and searching bankruptcy claims.
3846025811	1/6/2020	Montana Insurance Education Foundation, Inc.	Cyber Security & Insurance Risk Management	Property & Casualty	General: 2	The course addresses property and casualty insurance. Discusses cyber security risks, third party exposures, breach response, corporate risk management, emerging threats, social engineering, personally identifiable information and sale of cyber insurance.

4114973523	1/6/2020	Montana Insurance Education Foundation, Inc.	•	•	The course addresses product knowledge of casualty insurance. Discusses crop insurance errors and omissions exposures, risk management, placing coverage, and an errors and omissions crop risk management checklist.
12X4970100	1/7/2020	Montana Insurance Education Foundation, Inc.	National Flood Insurance Program Presents Flood Insurance Overview	Property & General: 1 Casualty	The course addresses product knowledge of property and casualty. Discusses the function of the National Flood Insurance Program, mechanics of flood insurance, policy basics, coverage and rating, flood maps and changes, standard flood policy coverage and claims.

64X8079513	1/7/2020	Prudential Annuities Life Assurance Corporation	What Are the Guideposts Pointing Towards a Global Economic and Market Recovery	Life	General: 1	The course addresses product knowledge of life insurance and management. Discusses economic data, global demand indicators, corporate earnings, global bank and competitive currencies, and stabilizing portfolios.
2275841525	1/7/2020	Montana Insurance Education Foundation, Inc.	National Flood Insurance Program Agent Post-Disaster Briefing	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses flood insurance coverage, claims, rating, post-disaster insurance requirements, assessing damage levels, repetitive loss, and compliance cost.

4287451232	1/7/2020	Prudential Annuities Life Assurance Corporation	Navigating Markets in a "Lower for Longer" Interest Rate Environment	Life	General: 1	The course addresses product knowledge of management and license insurance. Discusses international interest rates, quantitative easing, money policies, and the effect on insurance products.
51X152228	1/8/2020	DF Institute, dba Kaplan Financial	Employee Group Benefits	Disability (Health)	General: 5	NAIC Uniform submission, 5 computer-based, self study credit hours approved by Illinois. Discusses group life, health and disability plans, employer-provided health plans, group disability coverage options and federal provision requirements.

78X2407202	1/8/2020	ALPS (Attorneys Liability Protection Society) Corporation	Malpractice Insurance 101: An Introduction to Basic Insurance Concepts	Property & Casualty	General: 2	The course addresses product knowledge of casualty insurance. Discusses the need for lawyers professional liability insurance, insurance carries that provide coverage, the application process, policy coverage elements, underwriting, lawyers professional liability and coverage versus other policies, claims, and ensuring coverage.
91X6644813	1/8/2020	Northstar Educational Services	Ethics 2020	Ethics	Ethics: 3	The course addresses ethics. Discusses moral principles, avoidance of conflicts, unethical behavior, client need, suitability, risk tolerance, confidentiality, data protection, disclosure, and six case studies.

1533319834	1/8/2020	DF Institute, dba Kaplan Financial	Montana Legislative Changes Update 2019	MT Legislative Changes	MT Legislative Changes: 1	The course addresses insurance law. Discusses 2019 legislative changes to insurance statutes in House bills 62, 64, 66, 92, 373, 382, 489, 555, 578 and Senate bills 39, 55, 125, 205, and 240.
1612711772	1/8/2020	NAU Country Insurance Company	2020 Hail and Acreage Report	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Minnesota. Discusses 2020 crop hail acreage reporting, insured versus uninsured, late discovered acres, mapping, reporting elements, CRP and enterprise units, replanting, prevented planting and resources.
2304096562	1/8/2020	Northstar Educational Services	Life and Health Insurance Guaranty Association	Life	General: 1	The course addresses product knowledge of life insurance. Discusses Title 33, Chapter 10, Part 2 and the Montana life and health guaranty association.

2304096562	1/8/2020	Northstar Educational Services	Life Insurance Terminology	Life	General: 2	The course addresses product knowledge of life insurance. Discusses policy terminology, common insured misunderstanding of insurance terms, other insurance words and the use of each.
2628739978	1/8/2020	Professional Insurance Agents (PIA) of Montana	If It Moves On the Farm It Presents a Risk		General: 3	The course addresses product knowledge of property and casualty insurance. Discusses farm liability, bodily injury and property damage, definitions, exclusions, personal auto coverage, definitions and eligibility, exposures and business auto coverage.
2632889553	1/8/2020	Montana State Compensation Insurance Fund	Policy Services Quarterly Professional Development Meeting	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses other state coverage and non-resident endorsement, insuring the marijuana industry, insurance regulation, and complaints.

2860494093	1/8/2020	Pacific Life - Individual	Life Insurance Planning for Foreign Nationals	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by California. Discusses estate and gift tax plans, planning resident versus non-resident aliens, life insurance opportunities and estate liquidity.
3162878856	1/8/2020	Institute of Strategic Educational Partners	Fundamentals of Personal Risk Management	Property & Casualty	General: 8	NAIC Uniform submission, 8 computer-based, self study credit hours approved by Pennsylvania. Discusses risk management, personal risk, underwriting, pricing principles, and analytics.

an Agency business, ethical decision- making, agency disfunction, accountability, warning signs unethical organizational behaviors and the effect on	3605534447	1/8/2020	Professional Insurance Agents (PIA) of Montana	and E&O: The Right Way to Run	Ethics	Ethics: 3	making, agency disfunction, accountability, warning signs unethical organizational
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