

Insurance Continuing Education Advisory Council meeting - March 18, 2020

Transaction Number	Transaction Date	Provider Name	Course Name	Course Group	Credits	Course Summary
1336984687	2/10/2020	CEU Institute, Inc.	Behavioral Blends: An Interdisciplinary Approach to Behavior Management in an Acute Rehab Setting (1hr) Webinar	Adjuster	General: 1	The course addresses product knowledge of casualty and disability insurance. Discusses behavior intervention plans for injured workers with acquired brain injury.
4085075647	2/13/2020	Bison Mountain Financial	Social Security Disability	Disability (Health)	General: 2	NAIC Uniform submission, 2 web-based, classroom credit hours approved by Arizona. Discusses the 1935 Social Security Act, congressional revisions, eligibility, disability, disability determination process, benefit determination, taxation of benefits, benefits for family members of the disabled, and the benefit appeal process.
3267632194	2/17/2020	National Alliance for Insurance Education and Research	Whose Risk Is It? Managing Contracts (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses risk analysis and transfer, contractual risk transfer through indemnification agreement, waiver of subrogation, exculpatory agreement and limit of liability, risk control, fleet and driver administration, federal regulations and driver evaluation.

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3267632194	2/17/2020	National Alliance for Insurance Education and Research	Whose Risk Is It? Managing Contracts (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses risk analysis and transfer, contractual risk transfer through indemnification agreement, waiver of subrogation, exculpatory agreement and limit of liability, risk control, fleet and driver administration, federal regulations and driver evaluation.
164558693X	2/18/2020	Nationwide Life Insurance Company	Analysis of the SECURE Act Affecting Retirement Plans	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses the federal Setting Every Community Up for Retirement Enhancement legislation, multiple-employer plans and pooled employer plans, distribution rules and plan qualification provisions.
1752502834	2/18/2020	Leavitt Great West Insurance Services	HIPAA & the Plan Sponsor	Disability (Health)	General: 1	The course addresses product knowledge of disability insurance. Discusses Health Insurance Portability and Accountability Act compliance, program overview, privacy practice concerns and requirements, data breaches, required notification, violations, penalties and best practices.

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1694564451	2/19/2020	Montana Insurance Education Foundation, Inc.	Ethics, Can & Should Are Two Different Things	Ethics	Ethics: 3	The course addresses ethics. Discusses the history of ethical discourse, current examples of unethical behaviors, issue identification, ethical principles, ethical leadership, Ethisphere Institute report, and practical application of ethics in insurance.
2486984539	2/19/2020	CEU Institute, Inc.	NASP 2020 Subrogation Litigation: Skills & Management Conference	Adjuster	General: 11	The course addresses product knowledge of property and casualty insurance and management. Discusses product liability, smart home problems and subrogation, claims and actions specific to particular products and industries, and fifteen case studies.
3193665973	2/19/2020	Quest Continuing Education Solutions	Montana Insurance Code Update	MT Legislative Changes	MT Legislative Changes: 1	The course addresses insurance law. Discusses legislative changes made to Montana insurance statute during the 2019 legislative session by House bills 65, 92, 325, 373, 382, 578 and Senate bills 39 and 240.

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4202077427	2/19/2020	Montana Insurance Education Foundation, Inc.	Cyber/Data Breach Insurance, A Brief Primer	Property & Casualty	General: 2	The course addresses product knowledge of casualty insurance. Discusses cyber breach liability coverages, data loss, methods of data loss, data recovery, the cyber liability coverage form, cyber protection methods and defined items in the policy.
565288860X	2/20/2020	Montana Association of Mutual Insurance Companies (MAMIC)	Insurance Company Professional Liability Mock Trial	Property & Casualty	General: 4	The course addresses casualty insurance and management. Discusses directors and officers claims, role play of the steps and responsibilities associated with a professional liability insurance policy trial.
1488860877	2/20/2020	PayneWest Insurance, Inc.	Litigating the Insurance Claim- Web Based Classroom	Property & Casualty	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Washington. Discusses litigation in the insurance industry, the civil litigation process, steps in the litigation process, triggering of coverage and associated pleadings, settlements, alternative dispute resolution, motions and trial disposition.

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3698140789	2/20/2020	PayneWest Insurance, Inc.	Litigating the Insurance Claim- Live Class	Property & Casualty	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Washington. Discusses litigation in the insurance industry, the civil litigation process, steps in the litigation process, triggering of coverage and associated pleadings, settlements, alternative dispute resolution, motions and trial disposition.
4203492939	2/20/2020	WebCE, Inc.	How Commercial Crime Coverage Protects a Business	Property & Casualty	General: 6	NAIC Uniform submission, 6 classroom credit hours approved by Texas. Discusses crime insurance, employee theft and forgery coverage, coverage for theft of money and securities, computer funds transfer fraud coverage, commercial crime exclusion, kidnap, ransom and extortion coverage, endorsement to broaden crime coverage and other crime and theft endorsements.
2591524945	2/21/2020	National Alliance for Insurance Education and Research	Environmental Impairment Liability (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 web-based, classroom credit hours approved by Texas. Discusses pollution and environmental impairment definitions, pollution liability, loss exposures, legal concepts, statutory regulation of pollution, hazardous waste and toxins, liability and property insurance form coverage of pollution exposures and endorsements.

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2591524945	2/21/2020	National Alliance for Insurance Education and Research	Environmental Impairment Liability (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses pollution and environmental impairment definitions, pollution liability, loss exposures, legal concepts, statutory regulation of pollution, hazardous waste and toxins, liability and property insurance form coverage of pollution exposures and endorsements.
2374375618	2/24/2020	Marsh, Berry & Co., Inc.	Strategic Issues in Insurance Addendum, Spring 2020	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Ohio. Discusses business entity operation rating using seven evaluation standards on three case studies.
2374375618	2/24/2020	Marsh, Berry & Co., Inc.	Strategic Issues in Insurance, Spring 2020	Property & Casualty	General: 7	NAIC Uniform submission, 7 classroom credit hours approved by Ohio. Discusses business entity operation rating using seven evaluation standards on seven case studies.
2374375618	2/24/2020	Marsh, Berry & Co., Inc.	State of the Insurance Industry, Spring 2020	Property & Casualty	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Ohio. Discusses valuation of insurance agencies, valuation benchmarking, business succession strategies, and best practices.

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3060293461	2/24/2020	ALPS (Attorneys Liability Protection Society) Corporation	Navigating Difficult Situations at Work	Ethics	Ethics: 3	The course addresses ethics. Discusses workplace ethical concerns, ethical dilemmas in the workplace, applying individual judgement, resolving ethical problems, customer confidentiality, duty of competence, data breach notification, and security best practices.
1477529081	2/25/2020	Prudential Annuities Life Assurance Corporation	Annuities and Principle Protection	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses the effect of the current financial environment of annuity sales, product variations, fixed, variable, indexed and fixed indexed annuities, and registered index linked annuities.
303629638X	2/26/2020	Montana Insurance Education Foundation, Inc.	Professional and Executive Liability Coverage Gaps and How to Fill Them	Property & Casualty	General: 6	The course addresses product knowledge of property and casualty insurance. Discusses types of professional and executive liability coverages, exposures and coverage triggers, common policy forms, policy problems that create an error or omission, and errors and omissions claims.

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658020902X	2/26/2020	Montana Insurance Education Foundation, Inc.	Commercial Liability Coverage Gaps and How to Fill Them Part II	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses commercial general liability insurance, commercial auto insurance, workers' compensation insurance, employer's liability coverage, commercial excess and umbrella policies.
2009474966	2/26/2020	Montana Insurance Education Foundation, Inc.	Commercial Liability Coverage Gaps and How to Fill Them	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses legal duties to insureds, commercial general liability errors and omissions, policy errors, coverages included and specialized liability coverage policies.
2174127909	2/26/2020	Montana Insurance Education Foundation, Inc.	E & O Roadmap to Identity Theft	Property & Casualty	General: 3	The course addresses property and casualty insurance. Discusses exposures leading to identity theft, affected insureds, personal identity theft risk management, risk prevention and reduction, identity theft insurance and protection services, business exposures and red flags.

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1715399062	2/28/2020	Montana Insurance Education Foundation, Inc.	E&O Commercial Property Coverage Gaps and How to Fill Them Part II	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses co-insurance, time element coverage, and inland marine coverages.
1715399062	2/28/2020	Montana Insurance Education Foundation, Inc.	E&O Commercial Property Coverage Gaps and How to Fill Them Part I	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses general agency law, errors and omissions exposures, direct property errors and omissions, failure to cover all locations, and direct property valuation issues.
1715399062	2/28/2020	Montana Insurance Education Foundation, Inc.	E&O Roadmap to Homeowners Endorsements and Personal Inland Marine Part II	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses personal property endorsements, liability endorsements, and personal inland marine endorsements including art, fur and jewelry coverages and underwriting.
1715399062	2/28/2020	Montana Insurance Education Foundation, Inc.	E&O Roadmap to Homeowners Endorsements and Personal Inland Marine Part I	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses the Homeowners 04 and 06 policies, condominiums, renters, trust owners, real property endorsements, and named insureds.

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1715399062	2/28/2020	Montana Insurance Education Foundation, Inc.	E&O Roadmap to Homeowners Insurance Part II	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses perils insured and insured against, Coverage A and B Exclusions, Conditions, liability, medical, and additional coverages.
2420043352	2/28/2020	American Institute for CPCU (formerly AICPCU/Insurance Institute of America)	Ethical Decision Making in Risk & Insurance - 1 Hour	Ethics	Ethics: 1	NAIC Uniform submission, 1 teleconference credit hour approved by Pennsylvania. Discusses ethical behavior, professionalism, ethical standards, ethical responsibilities to groups, ethical dilemmas and perspectives, ethical decision-making, canons for ethical behavior and three case studies.
2461789971	2/28/2020	Montana Insurance Education Foundation, Inc.	Roadmap to Personal Auto and Umbrella Part I	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses personal auto policies, forms, named insured options, part A liability coverage, liability exclusions, medical payments coverage, uninsured motorist coverage exclusions, arbitration and personal vehicle damage coverage.

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2607797281	2/28/2020	Montana Insurance Education Foundation, Inc.	E&O Roadmap to Homeowners Insurance Part I	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses homeowners forms 3, 4 and 6, eligibility for homeowners forms, policy definitions and additional coverages available to a homeowners policy.
3200064895	2/28/2020	Montana Insurance Education Foundation, Inc.	Roadmap to Personal Auto and Umbrella Part II	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses personal auto policy endorsements, liability limits, rental car contracts and coverages, personal umbrella and excess limits, unusual exposures and errors and omissions loss control.
3540007850	2/28/2020	Montana Insurance Education Foundation, Inc.	E&O Exposure in Carrier Contracts and Other Legal Considerations	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses current ACORD forms, certificates of insurance, errors and omissions exposures of certificates, agency certificate issues, and decreasing exposure.

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4122263719	2/28/2020	DF Institute, dba Kaplan Financial	Annuity Essentials and FINRA Rule 2330	Life	General: 2	NAIC Uniform submission, 2 computer-based, self study credit hours approved by Illinois. Discusses annuity essentials, variable annuities, fiduciary responsibilities, federal and industry regulation, FINRA rule 2330 application, and client notification.
1792819467	3/3/2020	National Alliance for Insurance Education and Research	Advanced Continuing Education Series 8AC -054	Property & Casualty	General: 8	NAIC Uniform submission, 8 classroom credit hours approved by Texas. Discusses crime insurance and types of fraud, director's and officers, renewal quotes and separate coverages.
2401932716	3/4/2020	Montana Land Title Association	MLTA 2020 Spring Ethics (Ethical Dilemmas session)	Ethics	Ethics: 2	The course addresses ethics. Discusses situations in which clients requests cannot be honored, title actions when acting for another, special life and financial situations that may affect client requests.
4057736971	3/4/2020	National Alliance for Insurance Education and Research	Advanced Continuing Education Series 8AC -055	Property & Casualty	General: 8	NAIC Uniform submission, 8 classroom credit hours approved by Texas. Discusses Social Security, Medicare, Medicaid, and disability insurance.

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4269806412	3/4/2020	A. D. Banker and Company	Montana Legislative Updates	MT Legislative Changes	MT Legislative Changes: 1	The course addresses insurance law. Discusses producer affiliation, benevolent associations, policy rescissions, the Montana Reinsurance Association and program, mandatory auto insurance requirements, traffic safety program discounts, commercial driver's license permanent revocation, surplus lines insurance, independent review organizations,
419757502X	3/5/2020	ACUITY, a Mutual Insurance Company	ACUITY PERSONAL LINES OVERVIEW 2 CREDIT	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses auto coverages and endorsements, homeowner risk analysis, personal lines packages, umbrella insurance and other lines of coverage.
806799181X	3/5/2020	American Institute for CPCU (formerly AICPCU/Insurance Institute of America)	AIDA 182 - Risk and Insurance Analysis Techniques	Property & Casualty	General: 8	NAIC Uniform submission, 8 text-based, self study credit hours approved by Pennsylvania. Discusses analyzing risk, types of risk, probability distributions, modeling risk, loss exposures, loss reserves, setting rates, controlling risk and analyzing performance.

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919195301X	3/5/2020	American Institute for CPCU (formerly AICPCU/Insurance Institute of America)	AIDA 181 - Big Data Analytics for Risk and Insurance	Property & Casualty	General: 8	NAIC Uniform submission, 8 text-based, self study credit hours approved by Pennsylvania. Discusses analyzing big data, data management, predictive modeling, traditional analysis, smart product technology, applying data analysis to underwriting, risk management and claims.
1657259191	3/5/2020	CEU Institute, Inc.	Post Traumatic Stress Disorder Cases in Workers' Compensation (1hr) Webinar	Adjuster	General: 1	The course addresses product knowledge of disability and casualty insurance. Discusses defining post-traumatic stress disorders, how the disorder develops, situations that lead to post-traumatic stress, treatment and resolution strategies.
2736409350	3/5/2020	American Institute for CPCU (formerly AICPCU/Insurance Institute of America)	Managing Cyber Risk	Property & Casualty	General: 7	NAIC Uniform submission, 7 text-based, self study credit hours approved by Pennsylvania. Discusses cyber risk fundamentals and exposures, regulation, external cyber risk, organizational resiliency, risk mitigation, and insuring cyber risks.
3792367013	3/5/2020	CEU Institute, Inc.	2020 Primerus Defense Institute Convocation	Ethics	Ethics: 2	The course addresses ethics. Discusses bad faith litigation, statutory implications, litigation ethical biases and considerations.

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3792367013	3/5/2020	CEU Institute, Inc.	2020 Primerus Defense Institute Convocation	Adjuster	General: 3	The course addresses product knowledge of casualty insurance. Discusses corporate representation in depositions, cyber compliance in litigation, and artificial intelligence liability risks.
954096562X	3/6/2020	National Association of Insurance and Financial Advisors Montana	Everyday Ethics for Dealing with Clients and Your Business	Ethics	Ethics: 1	The course addresses ethics. Discusses the NAIFA Code of Ethics, laws and regulations, fiduciary duties, personal gain and ethical obligations.
2421293400	3/6/2020	National Association of Insurance and Financial Advisors Montana	The Secure Act What You Need to Know For Your Practice	Life	General: 2	The course addresses product knowledge of life insurance. Discusses the federal Setting Every Community Up for Retirement Enhancement legislation, beneficiary designations, types of trusts, tax strategies, common mistakes and strategies to consider.
2489542104	3/6/2020	National Association of Insurance and Financial Advisors Montana	Insurance, Succession, and Long-Term Care Planning in Today's Landscape	Life	General: 3	The course addresses product knowledge of life insurance and annuities. Discusses estate planning, irrevocable life insurance trusts, estate equalization, business succession, business valuation, disability insurance, key employee coverage and long-term care insurance.

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2534477321	3/6/2020	National Association of Radical Relevance Insurance and Financial Advisors Montana		Life	General: 2	The course addresses insurance management. Discusses providing client value, client need, providing expertise, decision-making for the client interest and the concept of loss aversion.
2913185111	3/6/2020	International Foundation of Employee Benefit Plans	EL180 Self-Funded Health Plans: Cost-Containment Strategies	Disability (Health)	General: 2	NAIC Uniform submission, 2 computer-based, self study credit hours approved by Wisconsin. Discusses employer self-funded health plans, participants, premiums, health care benefits, cost-effectiveness, plan design, care management strategies, employee premium contributions and health care communication.
2913185111	3/6/2020	International Foundation of Employee Benefit Plans	EL179 Leave Program Design and Administration	Disability (Health)	General: 4	NAIC Uniform submission, 4 computer-based, self study credit hours approved by Wisconsin. Discusses short-term paid leave, administering sick leave policies, other types of short-term leave, Family Medical Leave Act, paid disability leave, leave program administration and coordinating programs.

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2913185111	3/6/2020	International Foundation of Employee Benefit Plans	EL178 Managing Absence and Productivity Issues	Disability (Health)	General: 2	NAIC Uniform submission, 2 computer-based, self study credit hours approved by Wisconsin. Discusses health-related absence, absence management, stay-at-work versus return-to-work plans, and chronic conditions.
3256248796	3/6/2020	National Association of Insurance and Financial Advisors Montana	Let's All Talk About Ethics	Ethics	Ethics: 1	The course addresses ethics. Discusses business and professional ethics, conflicts of interest, common unethical practices, ethical responsibilities, industry change effect on industry ethics, agent versus insurer view of ethics , regulation and one case study.
3570481823	3/6/2020	National Association of Insurance and Financial Advisors Montana	Social Security, Retirement & Taxation: How Financial Products Work with Social Security	Annuity Suitability	General: 2	The course address product knowledge of social insurance. Discusses early versus delayed retirement, program qualification, taxation of benefits, and the blackout period.
3820340634	3/6/2020	Quest Continuing Education Solutions	Social Security: Maximizing Your Clients Benefits	Life	General: 1	The course addresses product knowledge of social insurance. Discusses Social Security value, eligibility, maximizing benefits, spousal benefit coordination, long- and short-range Social Security trust fund future and retirement income planning.

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1856617433	3/8/2020	Scully Health Management, Inc.	Dental Injuries: Pre-existing vs. existing webinar	Adjuster	General: 1	The course addresses product knowledge of casualty and disability insurance. Discusses workers' compensation coverage for common dental injuries, dental treatments, sequence of treatment, related versus unrelated treatment, and maintenance.
2305465124	3/8/2020	Bison Mountain Financial	Active Shooter Insurance	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Arizona. Discusses three case studies, insurance coverage, losses incurred following an active shooter event, named perils, preventive and crisis management services lawsuits and commercial assembly.
111451582X	3/9/2020	National Business Institute, Inc.	Auto Injury Litigation From Start to Finish	Ethics	Ethics: 1	The course addresses ethics. Discusses preventing conflicts of interest, client confidentiality, work-product and expert witness reports in progress and communicating with represented parties.
1836930400	3/9/2020	Protective Life Insurance Company	Ethics: Rules to Follow	Ethics	Ethics: 2	The course addresses ethics. Discusses professional ethics, business ethics history, regulation and the ethical landscape, codes of ethics, compliance and one case study.

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3086480541	3/9/2020	National Business Institute, Inc.	Auto Injury Litigation From Start to Finish	Property & Casualty	General: 5	The course addresses product knowledge of property and casualty insurance. Discusses case analysis and investigation, coverage research, settlement negotiations, bad faith, client confidentiality, arbitration and litigation.
3895320063	3/9/2020	Aviation Insurance Association	Aviation Insurance Seminar 5-20	Property & Casualty	General: 8	NAIC Uniform submission, 8 classroom credit hours approved by Kansas. Discusses technology in aviation, data monitoring, air show coverages, inadvertent fire foam discharges, international aviation insurance, and five case studies.
2360386160	3/10/2020	AXA Equitable Life Insurance Company	Accumulation, Retention and Succession Strategies for Professionals and Small Business Owners	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Georgia. Discusses life income planning for business, key employee and business succession planning, policy coordination, and distribution steps.

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3301624718	3/10/2020	Pilot Catastrophe Services, Inc.	RCBAP	Adjuster	General: 15	NAIC Uniform submission, 15 classroom credit hours approved by Alabama. Discusses residential condominium building association policies, coverages available, condominium associations, buildings covered, eligibility, valuation, replacement cost co-insurance, owner claim dwelling policy, and loss assessment.
803849134X	3/11/2020	Grinnell Mutual Reinsurance Company	Burn Cell Training	Property & Casualty	General: 8	NAIC Uniform submission, 8 classroom credit hours approved by Iowa. Discusses fire original and cause, live burn demonstrations, electrical fires with sprinkler systems and subrogation, arson, safe combustible storage, and demonstrations of risk reduction building technologies.
1880159180	3/11/2020	ALPS (Attorneys Liability Protection Society) Corporation	If you didn't document it, Did it happen? How to properly document files for Producers	Property & Casualty	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses market conduct record reduction, documentation guidelines, and documentation compliance.

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1379325667	3/12/2020	National Alliance for Insurance Education and Research	Special Property Endorsements & Gaps (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 web-based, classroom credit hours approved by Texas. Discusses analyzing loss exposures, generic coverage of standardized forms, horizontal property risk transfer, identifying insureds, insurable interest, valuation determination, loss exposure, and debris removal exposures.
1379325667	3/12/2020	National Alliance for Insurance Education and Research	Special Property Endorsements & Gaps (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses analyzing loss exposures, generic coverage of standardized forms, horizontal property risk transfer, identifying insureds, insurable interest, valuation determination, loss exposure, and debris removal exposures.
3524184011	3/12/2020	Montana Association of Mutual Insurance Companies (MAMIC)	Social Inflation	Property & Casualty	General: 1	The course addresses management. Discusses claim settlement and litigation, tort reform, and three case studies.
3524184011	3/12/2020	Montana Association of Mutual Insurance Companies (MAMIC)	Agent Errors & Omissions	Property & Casualty	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses errors and omissions coverage, policy features, risk management, and three case studies.

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3524184011	3/12/2020	Montana Association of Mutual Insurance Companies (MAMIC)	Directors & Officers Liability	Property & Casualty	General: 1	The course addresses product knowledge of casualty insurance. Discusses director's and officers policy coverage, public versus private company, employment practices liability, policy elements, claims and claimants.
3524184011	3/12/2020	Montana Association of Mutual Insurance Companies (MAMIC)	Cyber Liability	Property & Casualty	General: 1	The course addresses product knowledge of casualty insurance. Discusses cyber liability insurance coverage, information security laws, risk assessment, information security and incident response plans.

Individual Course Submission

	3/6/2020	William Harp	The SECURE Act: What you need to know for your practice, Scott, Tokerud & McCarty	Life	1	The course addresses product knowledge of life insurance and annuities. Discusses the federal Setting Every Community Up for Retirement Enhancement legislation, retirement plans, new required distribution date, designated and non-designated benefits, spousal rollover, and charitable remainder trusts.
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