

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

<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>
957324210	2/12/2021	National Alliance for Insurance Education and Research	Personal Auto Policy vs The World (Webinar)	Property & Casualty	General: 2	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses transportation network companies, coverage triggers, the personal auto policy, and one case study.
957324210	2/12/2021	National Alliance for Insurance Education and Research	Personal Auto Policy vs The World (Classroom)	Property & Casualty	General: 2	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses transportation network companies, coverage triggers, the personal auto policy, and one case study.
1185615540	2/12/2021	Federal Insurance Company	Cyber Risk Insurance: A Perspective on Claims and Coverage	Property & Casualty	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by New Jersey. Discusses types of cyber risks, exposures, coverages, reporting, first party expense cost, ransomware, industry trends, third party coverages and identifying the need.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

1673290577	2/12/2021	InsuranceStudy.com	MSK Risk Trends and Member Care Strategies	Disability (Health)	General: 1	NAIC Uniform submission, 1 web-based classroom credit hour approved by Illinois. Discusses musculoskeletal injury risks, COVID-19 effect on claims, and care strategies.
1881717486	2/12/2021	National Association of Health Underwriters	Self-Funded Certification (NAHU Virtual Event)	Disability (Health)	General: 3	NAIC Uniform submission, 3 web-based classroom credit hours approved by Illinois. Discusses self-funded plans, ERISA, stop-loss protection, plan funding options, terms and concepts, plan design, claim submission, due diligence and third party administration.
3253531039	2/12/2021	First American Title Insurance Company	Mechanic's Liens and Broken Priority	Title	General: 1	The course addresses product knowledge of title insurance. Discusses mechanic liens definitions, title exception to mechanic's liens, priority of coverage, broken priority, endorsements and underwriting.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

4273084775	2/12/2021	NAU Country Insurance Company	2021 Hail and Acreage Reporting Webinar	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Minnesota. Discusses reporting acreage, added land and changes, native sod and CRP requirements, qualifying enterprise units, prevented and replanting, crop hail rules and endorsements, companion plans and 2021 production policies.
2069967916	2/14/2021	Land Title Institute	2021 ALTA SPRINGBOARD	Title	General: 4	The course addresses product knowledge of title insurance. Discusses title claim adjustment, the effect of the pandemic on settlement, market and underwriting trends, licensing requirements, technology during the crisis, digital closing, and on-line notarizing.
2734561727	2/14/2021	National Alliance for Insurance Education and Research	Healthcare Opportunities, Exposures, Coverages (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses the system of healthcare, medical categories, managed care and cyber considerations.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

2734561727	2/14/2021	National Alliance for Insurance Education and Research	Healthcare Opportunities, Exposures, Coverages (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses the system of healthcare, medical categories, managed care and cyber considerations.
1231235537	2/16/2021	Group Benefits Division of Hartford Life Insurance Company	Return to Work Programs & Group Disability Insurance Webinar	Life	General: 1	The course addresses product knowledge of casualty and disability insurance. Discusses return to work concepts, best practices, cost\benefits of return to work, and disability policy language.
1515719803	2/16/2021	Group Benefits Division of Hartford Life Insurance Company	Absence Management Webinar	Life	General: 1	The course addresses product knowledge of disability insurance. Discusses the Family Medical leave Act, creating a healthy workplace, administration of workplace leave due to illness, leave laws and policies, and costs.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

2798029520	2/16/2021	CAPE School (Commonwealth Academy of Professional Education)	The High Cost of Cyber Threats (t)	Disability (Health)	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Virginia. Discusses cyber security risks, risk management, the NAIC Insurance Data Security Model Law, cyber security insurance programs and coverages, and one case study.
2798029520	2/16/2021	CAPE School (Commonwealth Academy of Professional Education)	The High Cost of Cyber Threats (w)	Disability (Health)	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Virginia. Discusses cyber security risks, risk management, the NAIC Insurance Data Security Model Law, cyber security insurance programs and coverages, and one case study.
2798029520	2/16/2021	CAPE School (Commonwealth Academy of Professional Education)	Ethics in the Insurance Business (t)	Ethics	Ethics: 4	NAIC Uniform submission, 4 classroom ethics credit approved by Virginia. Discusses insurance ethics, product suitability, client interest, representation ethics, ethical responsibilities, examinations and audits, ethical decision making and two case studies.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

2798029520	2/16/2021	CAPE School (Commonwealth Academy of Professional Education)	Ethics in the Insurance Business (w)	Ethics	Ethics: 4	NAIC Uniform submission, 4 classroom ethics credit approved by Virginia. Discusses insurance ethics, product suitability, client interest, representation ethics, ethical responsibilities, examinations and audits, ethical decision making and two case studies.
3381438030	2/16/2021	Broker Educational Sales and Training, Inc	Annuity Contract Structure and Suitability Practices	Annuity Suitability	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses deferred versus immediate, versus fixed versus variable annuities, types of contracts, parties to the contract, contract ownership, withdrawals, annuity tax laws and current annuity suitability training requirements.
3761562651	2/16/2021	Allianz Life Insurance Company of North America	How to Enhance Clients' Social Security Benefits - Webinar	Life	General: 1	The course addresses product knowledge of social insurance. Discusses program requirements, full retirement age, benefit timing and calculation, asset impact, survivor benefits and three case studies.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

3761562651	2/16/2021	Allianz Life Insurance Company of North America	How to Enhance Clients' Social Security Benefits	Life	General: 1	The course addresses product knowledge of social insurance. Discusses program requirements, full retirement age, benefit timing and calculation, asset impact, survivor benefits and three case studies.
4215130409	2/16/2021	CAPE School (Commonwealth Academy of Professional Education)	Ethical Choices in Insurance (t)	Ethics	Ethics: 4	NAIC Uniform submission, 4 classroom ethics credit hours approved by Virginia. Discusses insurance ethics, law and ethics, ethics codes, ethical decision making models, right versus wrong, and short-versus long-term dilemmas, and truth versus loyalty.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

4215130409	2/16/2021	CAPE School (Commonwealth Academy of Professional Education)	Ethical Choices in Insurance (w)	Ethics	Ethics: 4	NAIC Uniform submission, 4 classroom ethics credit hours approved by Virginia. Discusses insurance ethics, law and ethics, ethics codes, ethical decision making models, right versus wrong, and short-versus long-term dilemmas, and truth versus loyalty.
4215130409	2/16/2021	CAPE School (Commonwealth Academy of Professional Education)	Errors & Omissions: Specialized Protection for Entities (t)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Virginia. Discusses liability insurance, types of liability coverage, errors and omissions coverage, occurrence versus claims made coverage, exclusions, directors and officers coverage, types of claims, layering coverages, underwriting, managed care operation, medical information protection and security, vicarious liability and four case studies.



Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

4215130409	2/16/2021	CAPE School (Commonwealth Academy of Professional Education)	Errors & Omissions: Specialized Protection for Entities (w)	Property & Casualty	4	General:	NAIC Uniform submission, 4 classroom credit hours approved by Virginia. Discusses liability insurance, types of liability coverage, errors and omissions coverage, occurrence versus claims made coverage, exclusions, directors and officers coverage, types of claims, layering coverages, underwriting, managed care operation, medical information protection and security, vicarious liability and four case studies.
4215130409	2/16/2021	CAPE School (Commonwealth Academy of Professional Education)	Choosing the Right Medicare Plan for Your Client (t)	Disability (Health)	4	General:	NAIC Uniform submission, 4 classroom credit hours approved by Virginia. Discusses Medicare basics, Part A, B, C, and D coverage, eligibility, suitability, Medigap coverage and plans, Medicare supplement policy regulation, plan enrollment, comparing products and Medicare issues.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

4215130409	2/16/2021	CAPE School (Commonwealth Academy of Professional Education)	Choosing the Right Medicare Plan for Your Client (w)	Disability (Health)	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Virginia. Discusses Medicare basics, Part A, B, C, and D coverage, eligibility, suitability, Medigap coverage and plans, Medicare supplement policy regulation, plan enrollment, comparing products and Medicare issues.
913346524	2/17/2021	CAPE School (Commonwealth Academy of Professional Education)	The Value of Personal Lines Coverage (t)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Virginia. Discusses the personal lines market, personal auto and homeowners coverages, condominium and co-op coverage, home share issues, rating home risks, floater coverages, personal umbrella and four case studies.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

913346524	2/17/2021	CAPE School (Commonwealth Academy of Professional Education)	The Value of Personal Lines Coverage (w)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Virginia. Discusses the personal lines market, personal auto and homeowners coverages, condominium and co-op coverage, home share issues, rating home risks, floater coverages, personal umbrella and four case studies.
913346524	2/17/2021	CAPE School (Commonwealth Academy of Professional Education)	Taking A Risk: Professional Liability Coverage (t)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Virginia. Discusses professional liability risk, contracts for risk transfer, insurability, exclusions, damages, claim notice triggers, employment practices liability, exclusions, fiduciary liability insurance, medical malpractice insurance and additional insureds, other professional coverages and one case study.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

913346524	2/17/2021	CAPE School (Commonwealth Academy of Professional Education)	Taking A Risk: Professional Liability Coverage (w)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Virginia. Discusses professional liability risk, contracts for risk transfer, insurability, exclusions, damages, claim notice triggers, employment practices liability, exclusions, fiduciary liability insurance, medical malpractice insurance and additional insureds, other professional coverages and one case study.
913346524	2/17/2021	CAPE School (Commonwealth Academy of Professional Education)	Present Day Role of Life Insurance (t)	Life	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Virginia. Discusses types of life insurance products, cash value of whole life, term life, underwriting methods, rating factors, in-person versus on-line purchase of life insurance, uses for senior citizens and two case studies.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

913346524	2/17/2021	CAPE School (Commonwealth Academy of Professional Education)	Present Day Role of Life Insurance (w)	Life	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Virginia. Discusses types of life insurance products, cash value of whole life, term life, underwriting methods, rating factors, in-person versus on-line purchase of life insurance, uses for senior citizens and two case studies.
913346524	2/17/2021	CAPE School (Commonwealth Academy of Professional Education)	Pinpointing Claims Fraud Schemes (t)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Virginia. Discusses insurance claim fraud statistics, life and health fraud elements, auto and watercraft claims fraud, elements of property and business casualty claim fraud, social insurance fraud, licensee and company fraud, anti-fraud activities and detection, enforcement and four case studies.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

913346524	2/17/2021	CAPE School (Commonwealth Academy of Professional Education)	Pinpointing Claims Fraud Schemes (w)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Virginia. Discusses insurance claim fraud statistics, life and health fraud elements, auto and watercraft claims fraud, elements of property and business casualty claim fraud, social insurance fraud, licensee and company fraud, anti-fraud activities and detection, enforcement and four case studies.
2146893548	2/17/2021	CLM Group, Inc., dba Claims & Litigation Management Alliance	CLM Webcast: Exploring Policy Provisions for Cannabis	Adjuster	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses the cannabis market, hemp versus marijuana, insurance policy provisions, commercial general liability, exclusions, coverage issues and three legal cases.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

2211716719	2/17/2021	Nationwide Mutual Insurance Company	Virtual Commercial Package Basics 2021	Property & Casualty	General: 9	NAIC Uniform submission, 9 classroom credit hours approved by Ohio. Discusses coverages, commercial property policy options, business income insurance, crime, inland marine and workers' compensation insurance coverage.
2607213239	2/17/2021	Group Benefits Division of Hartford Life Insurance Company	Success in the Voluntary Market Webinar	Life	General: 1	The course addresses product knowledge of life and disability insurance. Discusses types of benefits offered to employees, voluntary choices, employee and employer needs, enrollment and claims.
497955334	2/18/2021	Independent Insurance Agents' Association of Montana	Farm Property	Property & Casualty	General: 6	The course addresses product knowledge of property and casualty insurance. Discusses farming and farm policies, farm dwellings, farm personal property coverage, coverage extensions, barns and outbuilding coverage, causes of loss form, named versus special perils, and endorsements.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

1327625882	2/18/2021	ACUITY, a Mutual Insurance Company	INTRODUCTION TO TRUCKING 2 CREDITS	Property & Casualty	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Wisconsin. Discusses loss exposure based on truck type and use, industry re-regulation, coverage forms and endorsements, occupational accident coverage versus workers' compensation coverage and risk management practices.
75406492	2/18/2021	National Alliance for Insurance Education and Research	Claims-Made Coverages & Quandaries (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses coverage forms, common business classes, claims-made coverage key issues, claims-made hazards and change of control.
75406492	2/18/2021	National Alliance for Insurance Education and Research	Claims-Made Coverages & Quandaries (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses coverage forms, common business classes, claims-made coverage key issues, claims-made hazards and change of control.



Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

385665966	2/19/2021	Prudential Annuities Life Assurance Corporation	Smart Money: Where Professional Investors are Finding Opportunities (Webinar)	Life	General: 1	The course addresses product knowledge of annuities. Discusses annuity portfolio investment options, financial markets, risk and market volatility, types of funds and strategy implications.
937725606	2/19/2021	American College (The)	HS 328 Investments	Life	General: 48	NAIC Uniform submission, 48 text-based self study credit hours approved by Pennsylvania. Discusses risk and return, securities law, fixed income and equity securities, valuation, investment companies and derivatives.
1390497006	2/19/2021	ALPS (Attorneys Liability Protection Society) Corporation	Implicit Bias Skills Awareness Training	Property & Casualty	General: 2	The course addresses management. Discusses recognizing and understanding bias, types of bias, and shifting attitudes.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

3047639252	2/19/2021	ClieTell CE	Retirement: The Power of an Insurance Plan	Life	General: 1	NAIC Uniform submission, 1 web-based classroom credit hour approved by California. Discusses retirement planning, employer defined contribution plans, accumulation attributes, integration with Social Security, annuities in retirement funding, longevity risk, and annuity income riders.
1398337633	2/21/2021	National Alliance for Insurance Education and Research	Cyber Liability - How Your Client Survives... (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses cyber risk exposures, cyber insurance, underwriting, network loss exposures, cyber liability, first- and third-party risk, direct and indirect intangible exposures, insuring agreements, and covered damages.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

1398337633	2/21/2021	National Alliance for Insurance Education and Research	Cyber Liability - How Your Client Survives... (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses cyber risk exposures, cyber insurance, underwriting, network loss exposures, cyber liability, first- and third-party risk, direct and indirect intangible exposures, insuring agreements, and covered damages.
949625752	2/22/2021	Consolidated Educational Services, Inc.	Planning for Uncertain Times: Is Some Certainty Afoot?	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Alabama. Discusses changes in retirement and estate taxation, irrevocable life insurance trusts, and three case studies.
1175824648	2/22/2021	RegEd, Inc.	Suitability of Annuity Transactions under the Best-Interest Standard, 2nd Edition	Life	General: 4	NAIC Uniform submission, 4 computer-based self study credit hours approved by North Carolina. Discusses types of annuities, purchasing annuities, financial concerns annuities in combination with other investments, annuities in retirement planning, disclosure obligations and best practices.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

1208468011	2/22/2021	Alpha Omega Disaster Restoration	Understanding Fire & Smoke Restoration (virtual)	Property & Casualty	General: 3	he course addresses product knowledge of property and casualty insurance. Discusses fire causes and severity, structural, water and soot damage, structure versus contents damage, damage cleaning coverage, restorable, non-restorable and non-transportable, fire department and insurance investigations and three case studies.
1208468011	2/22/2021	Alpha Omega Disaster Restoration	Water Mitigation (Beyond the Basics) (virtual)	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance . Discusses categories of contaminated water, clean-up scenarios and costs, renters versus owners, and four case studies.
1208468011	2/22/2021	Alpha Omega Disaster Restoration	Water Mitigation and Customer Communication (virtual)	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance. Discusses loss costs from water damage, common loss causes, standards of care, explaining the claim process, mitigating flood damage, and recommendations to insureds.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

1554303505	2/22/2021	CLM Group, Inc., dba Claims & Litigation Management Alliance	CLM Webcast: Preventing Nuclear Verdicts: Identifying Potential Problem Cases	Adjuster	General: 1	The course addresses product knowledge of casualty insurance. Discusses assessing damages on insurance claims, the court process, arguments for the jury and protecting the insureds' position.
4034730131	2/23/2021	Safelite Glass Corporation	The Future in Now	Property & Casualty	General: 2	NAIC Uniform submission, 2 web-based classroom credit hours approved by Ohio. Discusses vehicle glass technology, advanced driver assistance systems, SMART vehicles, and the insurance implication of new technology.
916961280	2/24/2021	Foremost Insurance Company	Ethics in Insurance and Business	Ethics	Ethics: 3	NAIC Uniform submission, 3 computer-based self study ethics credit approved by Michigan. Discusses ethics defined, workplace ethics, responsibility and ethical issues, addressing ethical issues and regulation.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

916961280	2/24/2021	Foremost Insurance Company	Travel Trailer Insurance	Property & Casualty	2	General: NAIC Uniform submission, 2 computer-based, self study credit hours approved by Michigan. Discusses the elements of the Foremost travel trailer program, coverage, optional and additional coverages, binding authority, risk requiring underwriting approval, unacceptable risks and two case studies.
2167771523	2/24/2021	Old Republic National Title Insurance Company - Rocky Mountain	SSU - Title Insurance - Industry Trends	Title	1	General: The course addresses product knowledge of title insurance. Discusses uniform closing instructions, using a closing template, general requirements, disclosures powers of attorney, post closing requirements, instructions regarding the transaction, state and federal requirements and digital closings.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

2828085836	2/24/2021	American College (The)	HS 326 Planning for Retirement Needs	Life	General: 46	NAIC Uniform submission, 46 computer-based self study credit hours approved by Pennsylvania. Discusses asset accumulation and distribution planning, qualified pension plans, qualified plan setup, administration, and termination, profit sharing plans, stock bonus and employee stock ownership plans, IRAs, SEPS, SIMPLEs, 403(b) and 457 plans, deferred compensation and nonqualified plans, Social Security benefits, and employee benefits.
3516782888	2/24/2021	CEU Institute, Inc.	Back and Neck Injuries: Latest Advances (1hr) Webinar	Adjuster	General: 1	The course addresses product knowledge of disability and casualty insurance and management. Discusses pain statistics and levels, lumbar and cervical vertebrae injuries, injury versus disease, physical therapy and other conservative treatments.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

3525816526	2/24/2021	WebCE, Inc.	Risk Management: Why and How	Property & Casualty	General: 3	NAIC Uniform submission, 3 computer-based, self study credit hours approved by Texas. Discusses risk management, loss exposure evaluation, risk management techniques, and risk management program establishment.
189578070	2/25/2021	Hartford Fire Insurance Company	Virtual Cyber Claims Made Policies	Property & Casualty	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Alabama. Discusses occurrence versus claims made policy coverage triggers, cyber coverage form, definitions and six case studies.
940270481	2/25/2021	CLM Group, Inc., dba Claims & Litigation Management Alliance	CLM Webcast: Negligent Security: From Incident to Answer	Adjuster	General: 1	The course addresses product knowledge of casualty insurance and management. Discusses negligent security definitions, incident and response, evidence following an incident, spoliation and affirmative defense.



Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

1567773793	2/25/2021	National Structured Settlements Trade Association	Day One NSSTA Educational Conference	Life	General: 3	The course addresses product knowledge of casualty insurance and annuities. Discusses structured settlements, funding settlements with annuities, types of annuities, the structured settlement contract, payment riders, and structuring payments.
3185713063	2/25/2021	United Insurance Educators, Inc.	UIECE Remaining Ethical in Insurance (Self-Study)	Ethics	Ethics: 5	The course addresses ethics. Discusses definitions, expectations, ethical attitudes, ethical decision-making and marketing, and ethical insurance sales.
3185713063	2/25/2021	United Insurance Educators, Inc.	UIECE Remaining Ethical in Insurance (Online)	Ethics	Ethics: 5	The course addresses ethics. Discusses definitions, expectations, ethical attitudes, ethical decision-making and marketing, and ethical insurance sales.
3348105615	2/25/2021	Land Title Institute	How to Get Your Cyber House in Order	Title	General: 1	The course addresses product knowledge of title insurance. Discusses common cyber security issues, protecting the client and business, and training for awareness.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

2394371259	2/26/2021	RegEd, Inc.	Annuity Transactions: Annuity Ensuring Suitability, Suitability 2nd Edition	General: 3	NAIC Uniform submission, 3 computer-based, self study credit hours approved by North Carolina. Discusses National Association of Insurance Commissioners annuity suitability changes, role of a fiduciary, determining financial objectives, Model regulation, care obligation of the licensee, and determining and meeting client risk tolerance.
2799712419	2/26/2021	Foremost Insurance Company	Ethics in Insurance and Business	Ethics: 3	NAIC Uniform submission, 3 computer-based self study ethics credit approved by Michigan. Discusses ethics defined, workplace ethics, responsibility and ethical issues, addressing ethical issues and regulation.
115345391	3/1/2021	International Foundation of Employee Benefit Plans	EL142 Retirement Plan Life Investments & Vendor Management	General: 4	NAIC Uniform submission, 4 computer-based, self study credit hours approved by Wisconsin. Discusses retirement planning, fiduciary responsibility, plan investment options, and responsibilities regarding retirement plan vendors.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

115345391	3/1/2021	International Foundation of Employee Benefit Plans	EL141 401(k) Plans	Life	General: 5	NAIC Uniform submission, 5 computer-based, self study credit hours approved by Wisconsin. Discusses pre-tax employer-sponsored retirement plans, employee and employer contributions, Safe Harbor contributions, enrollment arrangements, and pre-retirement distributions.
115345391	3/1/2021	International Foundation of Employee Benefit Plans	EL140 Defined Contribution Plans	Life	General: 1	NAIC Uniform submission, 1 computer-based, self study credit hour approved by Wisconsin. Discusses shift of retirement risk to participants, types of defined contribution retirement plans, investment costs, and distributions.
115345391	3/1/2021	International Foundation of Employee Benefit Plans	EL139 Defined Benefit Plans	Life	General: 2	NAIC Uniform submission, 3 computer-based, self study credit hours approved by Wisconsin. Discusses retirement plan sponsors, back filling payout, funding plans, plan distributions, and plan termination.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

115345391	3/1/2021	International Foundation of Employee Benefit Plans	EL138 Overview of Retirement Plans	Life	General: 3	NAIC Uniform submission, 4 computer-based, self study credit hours approved by Wisconsin. Discusses employer-sponsored retirement plans, retirement planning, fiduciary responsibility, plan investment options, and responsibilities regarding retirement plan vendors.
115345391	3/1/2021	International Foundation of Employee Benefit Plans	EL98 Understanding Social Security	Life	General: 4	NAIC Uniform submission, 4 computer-based, self study credit hours approved by Wisconsin. Discusses Social Security program impact, program funding, eligibility, benefits, program plans, and qualifying for benefits.
128715771	3/1/2021	American College (The)	HS 330 Fundamentals of Estate Planning	Life	General: 47	NAIC Uniform submission, 47 computer-based, self study credit hours approved by Pennsylvania. Discusses estate planning basics, planning documents, property interests, gift taxes, life and death transfers, charitable giving, and life insurance in estate planning.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

1740236402	3/1/2021	Prudential Annuities Life Assurance Corporation	Financial Professionals Life Guide to Charitable Planning Opportunities (Webinar)	1	General: The course addresses product knowledge of life insurance and annuities. Discusses charitable planning strategies, gifting, working with non-profit entities, and index variable annuities.
1740236402	3/1/2021	Prudential Annuities Life Assurance Corporation	Financial Professionals Life Guide to Charitable Planning Opportunities	1	General: The course addresses product knowledge of life insurance and annuities. Discusses charitable planning strategies, gifting, working with non-profit entities, and index variable annuities.
2131016805	3/2/2021	American College (The)	HS 321 Income Taxation	Life 45	General: NAIC Uniform course submission, 45computer-based, self study credit hours approved by Pennsylvania. Discusses income taxation, tax law, income and deductions, business assets, individual and business entity taxation and non-taxable exchanges.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

3915801142	3/2/2021	RegEd, Inc.	Advanced Variable Annuities, Second Edition	Annuity Suitability	General: 3	NAIC Uniform submission, 3 computer-based, self study credit hours approved by North Carolina. Discusses variable annuity contract elements, deferred variable annuity uses, taxation of qualified and non-qualified variable annuities and suitability disclosures.
686773622	3/3/2021	RegEd, Inc.	Insured Buy/Sell & Business Valuation, 2nd Edition	Life	General: 3	NAIC Uniform submission, 3 computer-based self study credit hours approved by North Carolina. Discusses types of entities, buy/sell agreements, cross purchase agreements, disability of a business partner, and closely held corporation valuation.
1387631120	3/3/2021	National Alliance for Insurance Education and Research	WC Funding Options (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses funding workers' compensation, exposure and retrospective rating, deductibles, rent-a-captive coverage, and self insurance.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

1387631120	3/3/2021	National Alliance for Insurance Education and Research	WC Funding Options (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses funding workers' compensation, exposure and retrospective rating, deductibles, rent-a-captive coverage, and self insurance.
3893941166	3/3/2021	ACUITY, a Mutual Insurance Company	PERSONAL LINES COVERAGES	Property & Casualty	General: 1	NAIC Uniform submission, 1 computer-based, self study credit hour approved by Wisconsin. Discusses cyber risk coverages, home-based business and mechanical breakdown coverage.
449176560	3/4/2021	CLM Group, Inc., dba Claims & Litigation Management Alliance	CLM Webcast: 2021 and Beyond: After COVID-19 Business Income Losses Will Never Be the Same!	Adjuster	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses the effect of COVID-19 on insurance claims, business interruption, claims and the legal rulings, considerations in claims involving COVID-19 and measuring losses.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

763376355	3/4/2021	Scully Health Management, Inc.	Post Acute Care and Hospital Discharge Planning	Adjuster	General: 1	The course addresses product knowledge of casualty and disability insurance. Discusses severe injury workers' compensation claim treatment trends, medical expense issues, planning for complex needs at hospital discharge, coordination of care and one case study.
2003950945	3/4/2021	National Alliance for Insurance Education and Research	Captives: What Are They and Do They Work (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses captive insurance and insurers, characteristics of a captive insurer, captive structure, types of captive insurers, and captive insurance programs.
2003950945	3/4/2021	National Alliance for Insurance Education and Research	Captives: What Are They and Do They Work (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses captive insurance and insurers, characteristics of a captive insurer, captive structure, types of captive insurers, and captive insurance programs.



Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

2550939550	3/4/2021	American Institute for CPCU (formerly AICPCU/Insurance Institute of America)	Ethical Decision Making in Risk & Insurance - 1 Hour Webinar	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.
3196385290	3/4/2021	American Institute for CPCU (formerly AICPCU/Insurance Institute of America)	AU 60 - Evaluating Commercial Underwriting Risks	Property & Casualty	General: 8	NAIC Uniform submission, 8 text based, self study credit hours approved by Pennsylvania. Discusses commercial underwriting, evaluating a commercial risk, organization operation, premium determination, underwriting decisions, and collaboration with the client.
3349051640	3/4/2021	WebCE, Inc.	Using the Risk Management Approach for Personal Lines Accounts	Property & Casualty	General: 6	NAIC Uniform submission, 6 computer-based, self study credit hours approved by Texas. Discusses personal risk management, personal auto and home owners endorsements, additional coverages, personal loss control and risk transfer.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

4106131897	3/4/2021	Broker Educational Sales and Training, Inc	IRA Planning - Webinar	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses individual retirement accounts, individual retirement annuities, contributions, tax deductibility, Roth IRAs, conversions, rollovers and federal DOL conflicts of interest.
29344380	3/5/2021	Delaware Life Marketing, LLC	Five New Tax-Efficient Alternatives to Stretch IRA - webinar	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Indiana. Discusses stretch IRAs, changes in tax benefits, new strategies, annuities in IRAs and beneficiary designation.
461400236	3/5/2021	National Alliance for Insurance Education and Research	Traps & Gaps in the ISO BAP (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses problem elements in the business auto policy, exclusions, physical damage coverage, and endorsements.
461400236	3/5/2021	National Alliance for Insurance Education and Research	Traps & Gaps in the ISO BAP (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses problem elements in the business auto policy, exclusions, physical damage coverage, and endorsements.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

1730512603	3/5/2021	RegEd, Inc.	Anti-Money Laundering for Insurance Suspicious Activity Reports, 3rd Edition	Property & Casualty	General: 2	NAIC Uniform submission, 4 computer-based self study credit hours approved by North Carolina. Discusses insurance-related money laundering, risks that allow for money-laundering, red flags and suspicious activity reports.
3360187969	3/5/2021	ALPS (Attorneys Liability Protection Society) Corporation	Outside Interests & the ALPS Law Firm	Property & Casualty	General: 1	The course addresses product knowledge of casualty insurance and management. Discusses conflicts of interest, the outside interest supplement, outside interest exposures, endorsements and one case study.
4062031872	3/5/2021	Delaware Life Marketing, LLC	Five New Tax-Efficient Alternatives to Stretch IRA	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Indiana. Discusses stretch IRAs, changes in tax benefits, new strategies, annuities in IRAs and beneficiary designation.
1403867298	3/6/2021	Stewart Title Guaranty - Missoula Office	POWER OF ATTORNEY	Title	General: 1	The course addresses product knowledge of title insurance and management. Discusses powers of attorney in land transfer, authenticity of the document, veracity of the document presenter, and four case studies.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

1847209753	3/8/2021	CLM Group, Inc., dba Claims & Litigation Management Alliance	CLM Webcast: Preventing Nuclear Verdicts: SESSION II: Slay the Reptile	Adjuster	General: 1	The course addresses product knowledge of property and casualty insurance and management. Discusses settlement and jury preparation following a litigated claim, trigger words that result in higher awards, corporations versus the little guy and two case study round table discussions.
2880233164	3/8/2021	Putnam Retail Management	Planning Considerations for Non- traditional Households (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance. Discusses basic information on defining non-traditional households, financial benefits available to traditional household, planning methods to provide retirement and wealth transfer, insurance-related considerations.
778405053	3/9/2021	Hartford Steam Boiler Inspection and Insurance Company	Homeowners Equipment Breakdown	Property & Casualty	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses terminology definitions, the homeowners equipment policy and breakdown coverage, service line coverage and exposures.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

1164066216	3/9/2021	National Alliance for Insurance Education and Research	Serving Your Client Through CP Ins. (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses commercial property insurance, exposures, co-insurance, optional coverage, spoilage coverage and blanket coverage.
2944919259	3/9/2021	Delta Dental Insurance Company	Changing Landscape for Dental: COVID-19 and election impacts	Disability (Health)	General: 1	NAIC Uniform submission, 1 web-based classroom credit hour approved by California. Discusses dental insurance benefits, basic benefits, the impact of COVID-19 on dentistry and the Affordable Care Act.
4097146835	3/9/2021	Broker Educational Sales and Training, Inc	The Advisors Guide to Annuities and Ethical Practices - Ethics	Ethics	Ethics: 3	The course addresses ethics. Discusses ethical marketing and unfair trade practices, insurance regulation and ethical responsibilities.
4097146835	3/9/2021	Broker Educational Sales and Training, Inc	The Advisors Guide to Annuities and Ethical Practices	Life	General: 12	The course addresses product knowledge of annuities. Discusses annuity basics, classifications, suitability, rates and fees, annuity tax laws, parties to the contract and ethical standards.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

4250814844	3/9/2021	National Alliance for Insurance Education and Research	Insuring Hurting Employees - WC & EPLI (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses insuring employees, workers' compensation, state-mandated coverages, benefit triggers, employers liability, employment practices liability insurance and federal endorsements.
35798562	3/10/2021	National Alliance for Insurance Education and Research	Insuring the Uninsurable (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses uninsurable exposures, insurable uninsurable exposures, the specialized captive as a means to insure, finite risk insurance, and four case studies.
35798562	3/10/2021	National Alliance for Insurance Education and Research	Insuring the Uninsurable (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses uninsurable exposures, insurable uninsurable exposures, the specialized captive as a means to insure, finite risk insurance, and four case studies.

Montana Insurance Continuing Education Advisory Council meeting - March 17, 2021

1949186881	3/10/2021	National Alliance for Insurance Education and Research	Add'l Insureds & Certs of Insurance (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses certificates of insurance, waiver of subrogation rights, requesting additional insureds, reasons to deny additional insureds, form changes and endorsements, and underlying insurance.
1949186881	3/10/2021	National Alliance for Insurance Education and Research	Add'l Insureds & Certs of Insurance (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses certificates of insurance, waiver of subrogation rights, requesting additional insureds, reasons to deny additional insureds, form changes and endorsements, and underlying insurance.
2390298290	3/10/2021	ClieTell CE	Retirement: Starts & Ends with a Plan	Life	General: 12	NAIC Uniform submission, 12 computer-based, self study credit hours approved by California. Discusses annuities defined, types of annuities, Securities and Exchange Commission definition of annuities, parties to an annuity, regulation, replacement requirements, matching the annuity to the annuitant, using annuities in retirement plans and fiduciary responsibilities.