

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

Transaction Number	Transaction Date	Provider Name	Course Name	Course Group	Credits	Course Summary
1844896484	3/4/2022	Mountain West Farm Bureau Mutual Insurance Company	Policy Language - Ag Advantage	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses property and liability coverage, endorsements, personal liability, and umbrella policy.
1844896484	3/4/2022	Mountain West Farm Bureau Mutual Insurance Company	Policy Language - Property	Property & Casualty	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses property and liability coverage, perils, exclusions and home classification.
1844896484	3/4/2022	Mountain West Farm Bureau Mutual Insurance Company	Policy Language - Umbrella and Inland Marine	Property & Casualty	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses advantages and disadvantages of umbrella insurance, liability extensions, limits and ineligible risks, inland marine perils, rules and truck cargo.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

768247092	3/9/2022	Independent Insurance Agents' Association of Montana	Nine Rules for Reading an Insurance Policy Based on the Law of Insurance Contracts	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses the law of contracts, characteristics of an insurance contract, elements of every insurance contract and what is meant, insureds, insuring agreements, exceptions and exclusions, and policy conditions.
1493690628	3/9/2022	Independent Insurance Agents' Association of Montana	Condos and How to Insure Them	Property & Casualty	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses insuring a condominium association versus unit owner, unit boundaries, defining the real property, property valuation and the effect of National Flood Insurance policies on writing a condominium policy.
1964052816	3/9/2022	National Alliance for Insurance Education and Research	Retirement Landmines (Webinar)	Life	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses Medicare health plans, long-term care planning and options, annuities, and funding retirement needs using annuities.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

1964052816	3/9/2022	National Alliance for Insurance Education and Research	Retirement Landmines (Classroom)	Life	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses Medicare health plans, long-term care planning and options, annuities, and funding retirement needs using annuities.
2617852666	3/9/2022	Independent Insurance Agents' Association of Montana	Three Keys to Getting the Named Insured Correct	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses determination of insurance coverage, commercial general liability versus business auto coverage insureds, workers' compensation insureds, extending insured status and combining entities.
3056919747	3/9/2022	American College (The)	CE 128 Ethics for Financial Services Professionals	Ethics	Ethics: 3	NAIC Uniform submission, 3 computer-based, self study credit hours approved by Pennsylvania. Discusses ethical principles, fiduciary responsibility, best interest standards, disclosure, transparency, and business culture.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

4222741616	3/9/2022	Independent Insurance Agents' Association of Montana	Four Key Personal and Commercial Lines Exposures Every Agent Must Understand	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses commercial general liability, the personal auto policy, driving for Uber, Lyft and other rideshare entities, endorsements to the personal auto policy, home sharing insurance exposures and coverages, drone operator exposures, and disruptor policies.
927908272	3/10/2022	Independent Insurance Agents' Association of Montana	Properly Calculating and Insuring the Business Income Exposure	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance and management. Discusses business income calculation, the business income worksheet, insurable versus compensable business income and coverages.
927908272	3/10/2022	Independent Insurance Agents' Association of Montana	ISO's 2022 Homeowners Changes: Some Big, Some Small, But All Important	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance and management. Discusses the ISO 14 homeowners policy, new homeowner endorsements, and form revisions.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

927908272	3/10/2022	Independent Insurance Agents' Association of Montana	How to Understand Commercial Property Underwriting and COPE	Property & Casualty	General: 2	The course addresses product knowledge of property insurance and management. Discusses property underwriting, the elements of construction, occupancy, protection and exposure in commercial property underwriting, managing hazards and elements of protection.
927908272	3/10/2022	Independent Insurance Agents' Association of Montana	Five Contractor Coverage Concepts Every Agent MUST Understand	Property & Casualty	General: 2	The course addresses product knowledge of casualty insurance. Discusses risk transfer through contract and the effect on insurance coverage, insured status, contractor business auto cover and risk, the pollution exclusion and contractor professional protective liability.
2293166652	3/11/2022	Equitable Financial Life Insurance Company, formerly AXA Equitable Life Insurance	Annuity as an Asset Class: Building a Suitable and Effective Income Producing Portfolio (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses inclusion of an annuity in a portfolio, risk-adjusted returns, and one case study.
2293166652	3/11/2022	Equitable Financial Life Insurance Company, formerly AXA Equitable Life Insurance	Annuity as an Asset Class: Building a Suitable and Effective Income Producing Portfolio	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses including an annuity in a portfolio, risk-adjusted returns, and one case study.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

4034505165	3/11/2022	Independent Insurance Agents' Association of Montana	Workers Compensation - Property & 5 Mistakes Every Agent Makes	Casualty	General: 2	The course addresses product knowledge of casualty and disability insurance. Discusses the relationship of state laws and doctrines with workers' compensation insurance, identifying covered employees, extraterritoriality, insureds and premium audits.
4034505165	3/11/2022	Independent Insurance Agents' Association of Montana	Why Certificates of Insurance - Just Why?	Property & Casualty	General: 2	The course addresses management and product knowledge of property and casualty insurance. Discusses certificates of insurance and the effect of the document, the underlying insurance contract, contractual risk transfer, proof of insurance, wording and issuing a certificate of insurance.
4034505165	3/11/2022	Independent Insurance Agents' Association of Montana	Why Business Income is THE Most Important Property Coverage	Property & Casualty	General: 2	The course addresses product knowledge of casualty insurance. Discusses concepts of business income insurance, policy provisions, the restoration period, operational capacity, co-insurance, and coverage amounts.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

4034505165	3/11/2022	Independent Insurance Agents' Association of Montana	Understanding Trucking and Motor Truck Insurance	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses trucking versus motor carrier coverage, tractor versus trailer coverage, liability exclusions, other insurance and provisions, using the Motor Carrier Supplement - 90 to add federally mandated coverage, and underwriting.
4034505165	3/11/2022	Independent Insurance Agents' Association of Montana	Understanding the Importance of Ordinance or Law Coverage	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses the commercial property policy, ordinance or law coverage, requirements, limitations, period of restoration, enforcement of building codes, and developing coverage limits.
4034505165	3/11/2022	Independent Insurance Agents' Association of Montana	Rules for Developing the Correct Premium	Property & Casualty	General: 2	The course addresses management. Discusses premium audit rules, estimated versus known exposures, workers' compensation, commercial general liability and commercial auto and garage audits.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

586859153	3/14/2022	CLM Group, Inc., dba Claims & Litigation Management Alliance	Session 5- 2022 CLM Workers Compensation & Retail, Restaurant & Hospitality Conference	Adjuster	General: 1	The course addresses product knowledge of casualty insurance. Discusses Americans with Disabilities lawsuits, unconscious bias, COVID-19 workers' compensation claims, and virus cost shifts to employers and insurers. This conference section includes four concurrent sessions on May 19, 2022.
586859153	3/14/2022	CLM Group, Inc., dba Claims & Litigation Management Alliance	Session 4- 2022 CLM Workers Compensation & Retail, Restaurant & Hospitality Conference	Adjuster	General: 1	The course addresses product knowledge of disability, property and casualty insurance. Discusses the businessowner policy and restaurants, employee mental health, premises liability, controlled substances Act cases, litigative investigation tactics and workplace diversity. This conference section includes six concurrent sessions on May 19, 2022.

586859153	3/14/2022	CLM Group, Inc., dba Claims & Litigation Management Alliance	Session 3- 2022 CLM Workers Compensation & Retail, Restaurant & Hospitality Conference	Adjuster	General: 1	The course addresses product knowledge of casualty insurance and management. Discusses claimant advocacy in workers' compensation, restaurant, retail and hospitality claims, creative settlement strategies, claim resource allocation, interior and exterior premises liability, and diversity in litigated claims. This conference section includes six concurrent sessions on May 19, 2022.
586859153	3/14/2022	CLM Group, Inc., dba Claims & Litigation Management Alliance	Session 2- 2022 CLM Workers Compensation & Retail, Restaurant & Hospitality Conference	Adjuster	General: 1	The course addresses product knowledge of disability and casualty insurance and management. Discusses employment case law, Medicare secondary payer cases, workers' compensation and remote workers, workers' compensation red flags and financial justice in claims. This conference section includes six concurrent sessions on May 19, 2022.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

586859153	3/14/2022	CLM Group, Inc., dba Claims & Litigation Management Alliance	Session 1- 2022 CLM Workers Compensation & Retail, Restaurant & Hospitality Conference	Adjuster	General: 1	The course addresses product knowledge of casualty insurance. Discusses cannabis claim trends, active shooting in the retail environment, plaintiff accountability and settlement outcomes. This conference section includes four concurrent sessions on May 19, 2022.
811069829	3/14/2022	First American Title Insurance Company	Decedents' Estates - A Review of Title After Death	Title	General: 1	The course addresses product knowledge of title insurance. Discusses death of a property owner and title holder, vesting, probate versus non-probate estate transfers, title commitments and underwriting.
2221766160	3/14/2022	Transamerica Occidental Life Insurance	Business Planning Using Life Insurance	Life	General: 1	The course addresses product knowledge of life insurance. Discusses employer-owned life insurance, key employee life, life insurance as an executive benefit, non-qualified deferred compensation and business succession planning.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

2353866632	3/14/2022	Voya Insurance and Annuity Company	Introduction to Flexible Spending Accounts	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Iowa. Discusses health and dependent care flexible spending accounts, health reimbursement arrangements, carry over of unused health flexible spending funds, tax savings, qualifying events and non-discrimination testing.
2887927278	3/14/2022	National Alliance for Insurance Education and Research	Money in Retirement Accounts (Webinar)	Life	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses financing a comfortable retirement, qualified retirement plans, Internal Revenue Service distribution rules, and life insurance and annuities in retirement planning.
2887927278	3/14/2022	National Alliance for Insurance Education and Research	Money in Retirement Accounts (Classroom)	Life	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses financing a comfortable retirement, qualified retirement plans, Internal Revenue Service distribution rules, and life insurance and annuities in retirement planning.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

3134771742	3/14/2022	Marsh, Berry & Co., Inc.	Strategic Issues in Insurance Addendum, Spring 2022	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Ohio. Discusses elements of three case studies, performance indicators, commissions and financial analysis and operational changes.
3134771742	3/14/2022	Marsh, Berry & Co., Inc.	Strategic Issues in Insurance, Spring 2022	Property & Casualty	General: 7	NAIC Uniform submission, 7 classroom credit hours approved by Ohio. Discusses elements of seven case studies, performance indicators, commissions and financial analysis and operational changes.
3134771742	3/14/2022	Marsh, Berry & Co., Inc.	State of the Insurance Industry, Spring 2022	Property & Casualty	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Ohio. Discusses economic forecasts, insurance-specific agency benchmarks, agency perpetuation and succession strategies, and agency best practices.
3230608912	3/14/2022	American Institute for CPCU (formerly AICPCU/Insurance Institute of America)	ACSR 12 - Disability and Health Insurance	Disability (Health)	General: 2	NAIC Uniform submission. 2 text-based, self study credit hours approved by Pennsylvania. Discusses disability and health loss exposures, disability income insurance, government and non-government healthcare programs, and long-term care coverage.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

3230608912	3/14/2022	American Institute for CPCU (formerly AICPCU/Insurance Institute of America)	ACSR 10 - Life Insurance	Life	General: 2	NAIC Uniform submission. 2 text-based, self study credit hours approved by Pennsylvania. Discusses life insurance, premature death loss exposure, client needs, types of life insurance and one case study.
4099481476	3/14/2022	Voya Insurance and Annuity Company	Group Disability Insurance 201	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Iowa. Discusses disability insurance and being disabled, long-term disability provisions, and Social Security disability benefits.
3129270360	3/15/2022	UNUM Group	Revolutionizing Benefits Enrollment	Life	General: 1	NAIC Uniform submission, 1 web-based classroom credit hour approved by Maine. Discusses employee benefit insurance products, and types of supplemental health insurance.
3725493429	3/15/2022	Transamerica Occidental Life Insurance	Business Planning Using Life Insurance (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance. Discusses employer-owned life insurance, key employee life, life insurance as an executive benefit, non-qualified deferred compensation and business succession planning.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

1990468964	3/16/2022	EFI Global Inc.	Utility Equipment 101 for Insurance Professionals	Adjuster	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses overhead, utility-owned electrical infrastructure, possible wildfire causes, and identifying the cause of fire damage.
492602332	3/17/2022	CLM Group, Inc., dba Claims & Litigation Management Alliance	Webinar - Fraudulent Claims Identification, Investigation and Litigation	Adjuster	General: 3	The course addresses product knowledge of property and casualty insurance and management. Discusses investigation of arson and theft fraud, fraud indicators, workers' compensation and third-party liability claim fraud and indicators, preservation of evidence, review of policy underwriting, and claim decisions.
1886320073	3/17/2022	AgriSompo North America Inc.	Prevented Planting Webinar	Property & Casualty	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses covered perils and crops eligible for prevented planting coverage, claims and adjuster responsibilities.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

1886320073	3/17/2022	AgriSompo North America Inc.	Prevented Planting	Property & Casualty	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses covered perils and crops eligible for prevented planting coverage, claims and adjuster responsibilities.
2324019297	3/17/2022	Voya Insurance and Annuity Company	Introduction to Health Savings Accounts	Life	General: 1	NAIC Uniform submission, 1 web-based classroom credit hours approved by Iowa. Discusses federal statutory requirements regarding health savings accounts, enrollment in health savings account qualified medical plans, contribution rules, and distribution rules, and taxation of benefits.
2819450654	3/17/2022	Broker Educational Sales and Training, Inc	Modern Retirement Plans and Ethical Practices	Ethics	Ethics: 3	The course addresses ethics. Discusses definitions of ethics, ethics in the insurance industry, insurers and producer ethical responsibilities, principals of agency law, and unfair marketing practices.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

2819450654	3/17/2022	Broker Educational Sales and Training, Inc	Modern Retirement Plans	Life	General: 15	The course addresses product knowledge of life insurance and annuities. Discusses retirement plans in business, types of business organizations, taxation of business and retirement plans, employer-sponsored retirement plans, qualified and non-qualified retirement plans, IRS section 401(K) retirement policies, KEOGH plans, defined benefit and defined contribution plans, hybrid and combination retirement plans.
103074772	3/18/2022	CLM Group, Inc., dba Claims & Litigation Management Alliance	Webinar - Medicare- Conditional payment claims, mandatory reporting, and MSA's	Adjuster	General: 3	The course addresses product knowledge of disability insurance. Discusses secondary payor act compliance, Medicare set aside, conditional payments, and mandatory insurer reporting.
630761213	3/18/2022	CLM Group, Inc., dba Claims & Litigation Management Alliance	Webinar - Litigation 101	Adjuster	General: 3	The course addresses management. Discusses phases of a lawsuit, vocabulary of litigation, state and federal court venues, defensive pleadings, parties to a lawsuit, the discovery process, and methods of disposition.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

1423927266	3/18/2022	CLM Group, Inc., dba Claims & Litigation Management Alliance	Webinar - Reservation of Rights and the Insured's Right to Personal Counsel	Adjuster	General: 3	The course addresses management and insurance law. Discusses identification of coverage, insurer disclamation of coverage, policy language, notification of insured, bad faith and duties to settle, and claim settlement resulting from improper coverage decisions.
2343173094	3/18/2022	CLM Group, Inc., dba Claims & Litigation Management Alliance	Webinar - Negotiation Strategies for claim professionals	Adjuster	General: 3	The course addresses management. Discusses response to conflict, negotiation steps, preparation, offers and counter offers, case resolution and one case study.
2516174025	3/18/2022	CLM Group, Inc., dba Claims & Litigation Management Alliance	Webinar - Hands On Mock Trial	Adjuster	General: 3	The course addresses management. Discusses jury consulting, trial simulation, witness research and verdict analysis, and using these services in a case.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

3057831678	3/18/2022	DF Institute, dba Kaplan Financial	Disability Income Insurance: Safeguarding Your Future (Webinar)	Life	General: 4	NAIC Uniform submission, 4 web-based classroom credit hours approved by Illinois. Discusses disability losses, disability coverages available, individual disability income insurance, optional benefits, underwriting disability income insurance and need determination.
3550277539	3/18/2022	EFI Global Inc.	Utility Equipment 101 for Insurance Professionals-Webinar	Adjuster	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses overhead, utility-owned electrical infrastructure, possible wildfire causes, and identifying the cause of fire damage.
1403762303	3/21/2022	Group Benefits Division of Hartford Life Insurance Company	Leave Management 2.0- Putting the Pieces Together Webinar	Life	General: 2	The course addresses product knowledge of social insurance and management. Discusses the federal Americans with Disabilities Act and Paid Medical and Family Leave Act, eligibility, coverage, compliance and non-compliance, and tracking time.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

1403762303	3/21/2022	Group Benefits Division of Hartford Life Insurance Company	Leave Management 2.0- Life Putting the Pieces Together	General: 2	The course addresses product knowledge of social insurance and management. Discusses the federal Americans with Disabilities Act and Paid Medical and Family Leave Act, eligibility, coverage, compliance and non-compliance, and tracking time.
1539851986	3/21/2022	DF Institute, dba Kaplan Financial	Ethics and Regulation in Ethics the Insurance Industry 2nd Ed. (Webinar)	Ethics: 4	NAIC Uniform submission, 4 web-based classroom ethics credit approved by Illinois. Discusses state and federal insurance regulation, ethical standards, agent and insurer responsibilities, ethical responsibilities to policyholders, industry responsibility to the public, and practical ethical behaviors.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

3216152170	3/21/2022	CEU Institute, Inc.	Chronic Regional Pain Syndrome (1hr) Webinar	Adjuster	General: 1	The course addresses product knowledge of casualty and disability insurance. Discusses regional sympathetic dystrophy versus complex pain syndrome diagnoses, changing diagnosis definition, origin of symptom complex, patient harm, sympathetically mediated pain, treatment and using pain blocks.
3809623178	3/21/2022	Voya Insurance and Annuity Company	Introduction to Health Reimbursement Arrangements	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Iowa. Discusses types of health reimbursement arrangements, employer-funded plans, federal Consolidated Omnibus Budget Reconciliation Act (COBRA) health coverage continuation, carryover of unused funds and disqualifying coverage.
266425509	3/22/2022	Hartford Fire Insurance Company	CGL Business Risk Exclusions	Property & Casualty	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses commercial general liability insurance, business risk exclusions and two case studies.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

2273957363	3/22/2022	Professional Liability Underwriting Society (PLUS)	Current Developments in the Canadian D & O Market Webinar	Property & Casualty	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Minnesota. Discusses directors and officers coverage, Canadian executive liability policies, using international policies to address modern exposures, and corporate governance.
579657056	3/23/2022	CLM Group, Inc., dba Claims & Litigation Management Alliance	CLM Webinar: Predator or Prey? Anchors Aweigh! The Anchoring Effect at Trial and in Negotiation	Adjuster	General: 1	The course addresses management. Discusses claim and litigation negotiation strategies, setting or limiting the negotiated claim amount and determining risk.
1833264368	3/23/2022	DF Institute, dba Kaplan Financial	Life Insurance and Annuities: The Effects of Income and Estate Taxation, 2nd Ed (Webinar)	Life	General: 4	NAIC Uniform submission, 4 web-based classroom credit hours approved by Illinois. Discusses taxation of life insurance and annuity benefits, living proceeds versus policy payouts, policy exchanges and taxation of annuities and life insurance in an estate.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

2603974953	3/23/2022	ACUITY, a Mutual Insurance Company	RETAIL COVERAGES	Property & Casualty	General: 1	NAIC Uniform submission, 1 computer-based, self study credit hour approved by Wisconsin. Discusses retail industries, risk management, applicable coverages, wholesaler exposures and claims.
4149938101	3/23/2022	Brighthouse Financial	Seeking Tax Alpha in a Changing Environment - webinar	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by North Carolina. Discusses variable life insurance and annuity returns that exceed the benchmark, tax planning, diversification, retirement income structure and legacy planning.
4184820210	3/23/2022	Brighthouse Financial	Seeking Tax Alpha in a Changing Environment	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by North Carolina. Discusses variable life insurance and annuity returns that exceed the benchmark, tax planning, diversification, retirement income structure and legacy planning.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

271700083	3/24/2022	CAPE School (Commonwealth Academy of Professional Education)	Homeowners Insurance Coverage	Property & Casualty	General: 5	NAIC Uniform submission, 5 computer-based, self study credit hours approved by Virginia. Discusses types of homeowners insurance, Homeowners insurance forms, coverage eligibility, flood and dwelling insurance, and policy claims.
2035804389	3/24/2022	CAPE School (Commonwealth Academy of Professional Education)	Disability Income Insurance	Disability (Health)	General: 5	NAIC Uniform submission, 5 computer-based, self study credit hours approved by Virginia. Discusses group and individual disability income plans, Social Security and workers' compensation disability benefits, state benefits, insurance policies and programs, policy provisions and types of benefits, group plans, business continuation and buy-sell agreements, high-limit policies, and return-to-work integration trends.
2035804389	3/24/2022	CAPE School (Commonwealth Academy of Professional Education)	Everyday Law for Insurance Agents	Property & Casualty	General: 4	NAIC Uniform submission, 4 computer-based, self study credit hours approved by Virginia. Discusses risk and liability, agency law, laws that affect insurance businesses and insurance statutes.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

2035804389	3/24/2022	CAPE School (Commonwealth Academy of Professional Education)	Automobile Insurance Coverage	Property & Casualty	General: 7	NAIC Uniform submission, 7 computer-based, self study credit hours approved by Virginia. Discusses the history of automobile insurance, the basics and types of auto policies, personal and commercial vehicle coverages, state- specific laws and rules, and auto insurance fraud and safety issues.
86667836	3/25/2022	National Association of Insurance and Financial Advisors Montana	The Three Hats Approach to Successfully Meeting the Client's Needs	Life	General: 1	The course addresses product knowledge of life insurance and management. Discusses members of a retirement planning team, liability risk reduction and needs assessment.
142477576	3/25/2022	Pruco Life Insurance Company	Exit Planning for the Closely Held Business Using Life Insurance (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance. Discusses business continuation planning, the business life cycle, ownership exit planning, buy-sell agreements, life insurance funding of the plan and managing the arrangement.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

716918730	3/25/2022	DF Institute, dba Kaplan Financial	Ethics and the Business of Insurance (Webinar)	Ethics	Ethics: 4	NAIC Uniform submission, 4 web-based classroom ethics credit hours approved by Illinois. Discusses ethical principles, responsibilities to insurers, clients and the public, regulatory requirements, and ethics in practice.
1641597810	3/25/2022	Crop Risk Services, formerly ADM Crop Risk Services, Inc.	RIVI: Insurance Basics/Updates	Property & Casualty	General: 1	NAIC Uniform submission, 1 web-based classroom credit hour approved by Illinois. Discusses rainfall index and vegetative index (RIVI), the crop reinsurance agreement, plan information and responsibilities, common procedures, insured, insured crops and insurable acreage, insurable interest and coverage decisions.
2242933403	3/25/2022	Pruco Life Insurance Company	Exit Planning for the Closely Held Business Using Life Insurance	Life	General: 1	The course addresses product knowledge of life insurance. Discusses business continuation planning, the business life cycle, ownership exit planning, buy-sell agreements, life insurance funding of the plan and managing the arrangement.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

2318277118	3/25/2022	Independent Insurance Agents' Association of Montana	Agency Management Based E&O and Ethics	Ethics	Ethics: 3	The course addresses ethics. Discusses agency processes that avoid errors and omissions, agency culture and disfunction, ethical decision-making, defining a lack of ethical clarity, processes and procedures to control organizational risk, and incorporating internal organizational trust.
2318277118	3/25/2022	Independent Insurance Agents' Association of Montana	Additional Insureds: Issues and Endorsements	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses commercial business insurance, the effect of leases and construction agreements on existing insurance coverages, additional insureds, commercial general liability endorsements and coverages for construction and non-construction agreements, commercial auto coverages and the affect on coverages.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

2318277118	3/25/2022	Independent Insurance Agents' Association of Montana	Active Shooter/Workplace Violence Risk and Insurance Programs	Property & Casualty	General: 2	The course addresses product knowledge of casualty insurance. Discusses workplace safety in active shooter and workplace violence procedures, event characteristics, past versus recent events, current trends, litigation regarding past and recent events, exposures, coverages and risk industry coverage needs.
2318277118	3/25/2022	Independent Insurance Agents' Association of Montana	A Little of This, A Little of That: New Threats and Possibilities in Commercial and Personal Lines Insurance	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses ridesharing exposures and coverage options, home sharing exposures and coverage, property pimping, and drone exposures.
2390166462	3/25/2022	Pruco Life Insurance Company	Legacy Planning Strategies (Webinar)	Life	General: 1	The course addresses product knowledge life insurance and annuities. Discusses legacy and estate planning, estate plan reviews, beneficiary audits, distribution options for retirement assets and non-qualified annuities, and legacy protection.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

2390166462	3/25/2022	Pruco Life Insurance Company	Legacy Planning Strategies	Life	General: 1	The course addresses product knowledge life insurance and annuities. Discusses legacy and estate planning, estate plan reviews, beneficiary audits, distribution options for retirement assets and non-qualified annuities, and legacy protection.
3132066840	3/25/2022	National Alliance for Insurance Education and Research	Transportation Expos of the AG. Client Classroom	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses risk management in agriculture, farm liability coverage and vehicle risk, the personal auto policy, and business auto coverage and agriculture risk.
3132066840	3/25/2022	National Alliance for Insurance Education and Research	Transportation Expos of the AG. Client Webinar	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses risk management in agriculture, farm liability coverage and vehicle risk, the personal auto policy, and business auto coverage and agriculture risk.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

3477132191	3/25/2022	Pruco Life Insurance Company	It's a Numbers Game: It's about the Cash Flow not the Cash Pile (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses retirement planning and fund accumulation, retirement cash flow threats, creating certainty in retirement income and one case study.
3477132191	3/25/2022	Pruco Life Insurance Company	It's a Numbers Game: It's about the Cash Flow not the Cash Pile	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses retirement planning and fund accumulation, retirement cash flow threats, creating certainty in retirement income and one case study.
3609303413	3/25/2022	Pruco Life Insurance Company	Keeping Score: Understanding and Improving your Credit (Webinar)	Life	General: 1	The course addresses life insurance and management. Discusses the impact of the transition from FICO (formerly Fair, Isaac and Company) 8, 9 and 10, changes in the reporting standards and opt-in requirements, resulting interest rates and investment opportunities, changing a credit score and which FICO score is applied to which debt or prospective debt.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

3609303413	3/25/2022	Pruco Life Insurance Company	Keeping Score: Understanding and Improving your Credit	Life	General: 1	The course addresses life insurance and management. Discusses the impact of the transition from FICO (formerly Fair, Isaac and Company) 8, 9 and 10, changes in the reporting standards and opt-in requirements, resulting interest rates and investment opportunities, changing a credit score and which FICO score is applied to which debt or prospective debt.
4239317130	3/25/2022	National Association of Insurance and Financial Advisors Montana	Key Employee Retention and Succession Planning in 2022	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses need evaluation, key employee retirement and retention planning, plan design and business succession.

1255267996	3/26/2022	HealthEquity, Inc.	HRAs New Regulations, Life New Opportunities	General: 1	NAIC Uniform submission, 1 web-based classroom credit hour approved by Utah. Discusses health reimbursement arrangement changes in 2020, tax-advantaged benefit plans funded by employers, elimination of the group health insurance requirement, advantages to employers and employees, plan options, and best practices.
516659362	3/28/2022	Nationwide Life Insurance Company	Today's Retirement Plan- Life Focused Financial Professional (Webinar)	General: 1	The course addresses product knowledge of life and social insurance and annuities. Discusses fiduciary behavior, prohibited transactions, business documentation, fiduciary versus non-fiduciary business activities, and compensation agreement structure.
516659362	3/28/2022	Nationwide Life Insurance Company	Today's Retirement Plan- Life Focused Financial Professional	General: 1	The course addresses product knowledge of life and social insurance and annuities. Discusses fiduciary behavior, prohibited transactions, business documentation, fiduciary versus non-fiduciary business activities, and compensation agreement structure.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

1170483969	3/28/2022	Pruco Life Insurance Company	Protecting Retirement Income (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses retirement asset risks, protecting retirement income, and index variable annuities.
1170483969	3/28/2022	Pruco Life Insurance Company	Protecting Retirement Income	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses retirement asset risks, protecting retirement income, and index variable annuities.
1212299574	3/28/2022	Pruco Life Insurance Company	Financial Professionals Guide to Charitable Planning Opportunities	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses charitable planning strategies, gifting, non-profit organizations, and annuity benefits.
1796104326	3/28/2022	Pruco Life Insurance Company	Breached: A Guide to Protecting your Information and Defending Against Identity Theft (Webinar)	Life	General: 1	The course addresses management. Discusses cyber breaches, malware and identity theft, client personal information strategies, and vulnerabilities, and best practices.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

1796104326	3/28/2022	Pruco Life Insurance Company	Breached: A Guide to Protecting your Information and Defending Against Identity Theft	Life	General: 1	The course addresses management. Discusses cyber breaches, malware and identity theft, client personal information strategies, and vulnerabilities, and best practices.
1802494383	3/28/2022	Pruco Life Insurance Company	IRA Opportunities: Advanced IRA Strategies (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses withdrawal strategies, required minimum distributions, Roth and Legacy strategies.
1802494383	3/28/2022	Pruco Life Insurance Company	IRA Opportunities: Advanced IRA Strategies	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses withdrawal strategies, required minimum distributions, Roth and Legacy strategies.
1827160096	3/28/2022	Pruco Life Insurance Company	Business Continuation (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses buy-sell plans, plan types, funding option advantages and disadvantages.
1827160096	3/28/2022	Pruco Life Insurance Company	Business Continuation	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses buy-sell plans, plan types, funding option advantages and disadvantages.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

2295883721	3/28/2022	Pruco Life Insurance Company	A Financial Professional Life Guide to the Changing Tax Environment (Webinar)	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses charitable planning strategies, gifting, non-profit organizations, and annuity benefits.
2295883721	3/28/2022	Pruco Life Insurance Company	A Financial Professional Life Guide to the Changing Tax Environment	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses charitable planning strategies, gifting, non-profit organizations, and annuity benefits.
2395262649	3/28/2022	Protective Life Insurance Company	Creating a Goals-Based Life Retirement Income Plan (Webinar)	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses portfolio-versus goals-based retirement planning, investment risk, flexible and inflexible retirement expenses, annuities with guaranteed income, and balancing a plan.
2462327137	3/28/2022	Pruco Life Insurance Company	Best Practices for Retirement Income Planning	Life General: 1	The course addresses product knowledge life insurance and annuities. Discusses accumulation versus distribution, retirement risks, analyzing investment allocation, and issues when retirement approaches.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

2830777772	3/28/2022	Pruco Life Insurance Company	Estate Planning and Transferring Wealth Strategies	Life	General: 1	The course addresses product knowledge life insurance and annuities. Discusses tools to protect the client, legacy protection, taxation of estates.
2837315532	3/28/2022	Pruco Life Insurance Company	Access Trusts Using Life Insurance	Life	General: 1	The course addresses product knowledge life insurance. Discusses irrevocable life insurance trusts, Access trust design, access to trust assets during lifetime, design issues.
3090019401	3/28/2022	Pruco Life Insurance Company	Professional Ethics: Doing Business the Right Way (1hr) (Webinar)	Life	General: 1	The course addresses ethics. Discusses ethical decision-making, ethical sales practices, annuity suitability, and determining client benefit.
3090019401	3/28/2022	Pruco Life Insurance Company	Professional Ethics: Doing Business the Right Way (1hr)	Life	General: 1	The course addresses ethics. Discusses ethical decision-making, ethical sales practices, annuity suitability, and determining client benefit.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

3090836233	3/28/2022	Nationwide Life Insurance Company	Annuity Contract Ownership (Webinar)	Life	General: 1	The course addresses product knowledge of annuities. Discusses types of annuities, annuity benefits, parties to the annuity contract, contract structure, and two case studies.
3187995534	3/28/2022	Pruco Life Insurance Company	Managing 8 Risks to Retirement Income: Benefits of Using Life Insurance in Retirement Income Plans (Webinar)	Life	General: 1	The course addresses product knowledge life insurance. Discusses retirement income risk, and using life insurance to mitigate market, longevity, withdrawal, inflation and healthcare cost risks in retirement.
3187995534	3/28/2022	Pruco Life Insurance Company	Managing 8 Risks to Retirement Income: Benefits of Using Life Insurance in Retirement Income Plans	Life	General: 1	The course addresses product knowledge life insurance. Discusses retirement income risk, and using life insurance to mitigate market, longevity, withdrawal, inflation and healthcare cost risks in retirement.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

3208454612	3/28/2022	Pruco Life Insurance Company	Estate Planning in the Current Tax Environment (Webinar)	Life	General: 1	The course addresses product knowledge life insurance. Discusses the federal estate taxation, inheritance taxes, gifting strategies, spousal lifetime access trusts, and survivorship standby trusts.
3208454612	3/28/2022	Pruco Life Insurance Company	Estate Planning in the Current Tax Environment	Life	General: 1	The course addresses product knowledge life insurance. Discusses the federal estate taxation, inheritance taxes, gifting strategies, spousal lifetime access trusts, and survivorship standby trusts.
3560702177	3/28/2022	Pruco Life Insurance Company	Advanced Strategies To Increase Social Security Income (Webinar)	Life	General: 1	The course addresses social insurance. Discusses the Social Security system, maximizing Social Security benefits, retirement cash flow, and annuities in retirement income plans.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

3560702177	3/28/2022	Pruco Life Insurance Company	Advanced Strategies to Increase Social Security Income	Life	General: 1	The course addresses social insurance. Discusses the Social Security system, maximizing Social Security benefits, retirement cash flow, and annuities in retirement income plans.
3571671038	3/28/2022	Pruco Life Insurance Company	Longevity: Real-Life Challenges During Retirement	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses longevity planning, healthcare costs, living alone in later in life, other medical issues, and withdrawals from retirement accounts.
3796953296	3/28/2022	DF Institute, dba Kaplan Financial	Financial Exploitation of Seniors: Why Insurance Agents Should Care, 2nd Edition	Life	General: 2	NAIC Uniform submission, 2 general, computer-based self-study credit approved by Illinois. Discusses financial vulnerability, identifying warning signals, moral considerations, and types of vulnerability.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

1212299574	3/28/2022	Pruco Life Insurance Company	Financial Professionals Guide to Charitable Planning Opportunities	Life	General: 1	NAIC Uniform submission, 2 general, computer-based self-study credit approved by Illinois. Discusses financial vulnerability, identifying warning signals, moral considerations, and types of vulnerability.
3934338670	3/28/2022	Pruco Life Insurance Company	Financial Professionals Guide to Charitable Planning Opportunities (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses gifting, charitable planning strategies, annuities as non-profit charitable gifts.
4077121457	3/28/2022	Pruco Life Insurance Company	Annuity Basics 1 Hour	Life	General: 1	The course addresses product knowledge of annuities. Discusses retirement income, types of annuities, qualified versus non-qualified plan taxation, and annuity contract structure.
4160749215	3/28/2022	Pruco Life Insurance Company	From One Generation to the Next: Benefits of Funding Trusts with Annuities	Life	General: 1	The course addresses product knowledge of annuities. Discusses annuity trust funding, types of trusts, and three case studies.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

4240670039	3/28/2022	Protective Life Insurance Company	Creating a Goals-Based Retirement Income Plan	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses portfolio-versus goals-based retirement planning, investment risk, flexible and inflexible retirement expenses, annuities with guaranteed income, and balancing a plan.
229160368	3/29/2022	Crop Risk Services, formerly ADM Crop Risk Services, Inc.	General Standards Handbook for Crop Insurance	Property & Casualty	General: 2	NAIC Uniform submission, 2 web-based classroom credit hours approved by Illinois. Discusses the federal reinsurance agreement, the Insurance Standards and General Standards Handbooks, program requirements, and acreage reporting.
309169845	3/29/2022	Zurich Agency Services Inc.	Workers' Compensation Payroll Reporting	Property & Casualty	General: 1	The course addresses social insurance and management. Discusses state and federal reporting requirements, required and excluded information, payroll changes, efficiencies and exposures.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

335446509	3/29/2022	CEU Institute, Inc.	The Psychology of an Injury (1hr) Webinar	Adjuster	General: 1	The course addresses product knowledge of disability and casualty insurance. Discusses chronic pain statistics, pain as a disrupter of physiological and psychological needs, physical pain and mental health, and models of treatment.
610323307	3/29/2022	Pruco Life Insurance Company	Is a Bear Hibernating? (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses possible bear market indicators, prior causes, Federal Reserve actions, and planning.
991313599	3/29/2022	Independent Insurance Agents' Association of Montana	Ethics: Creating a Winning Culture in the Agency	Ethics	Ethics: 3	The course addresses ethics. Discusses ethics versus values, organizational culture, ethics in risk control, and procedures.
1445997443	3/29/2022	Pruco Life Insurance Company	Managing Health Care Costs in Retirement (Webinar)	Life	General: 1	The course addresses product knowledge of social, and disability insurance. Discusses healthcare in retirement planning, health cost management, Medicare, retirement health insurance, and paying for coverage.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

1445997443	3/29/2022	Pruco Life Insurance Company	Managing Health Care Costs in Retirement	Life	General: 1	The course addresses product knowledge of social, and disability insurance. Discusses healthcare in retirement planning, health cost management, Medicare, retirement health insurance, and paying for coverage.
2185980768	3/29/2022	Independent Insurance Agents' Association of Montana	Certificates of Insurance - Embrace the Pain	Property & Casualty	General: 1	he course addresses product knowledge of property and casualty insurance. Discusses the purpose of certificates of insurance, included information, and typical requests for inclusion.
2203293983	3/29/2022	Producers Choice Network	Variable and Structured Annuities	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Michigan. Discusses types of variable annuities, registered index-linked annuities, suitability and best practices.
2279931082	3/29/2022	Pruco Life Insurance Company	Advanced Leveraged Gifting Strategies (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses lifetime versus testamentary gifts, survivorship access trusts, and survivorship strategies.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

2279931082	3/29/2022	Pruco Life Insurance Company	Advanced Leveraged Gifting Strategies	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses lifetime versus testamentary gifts, survivorship access trusts, and survivorship strategies.
2483656079	3/29/2022	Pruco Life Insurance Company	Is a Bear Hibernating	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses possible bear market indicators, prior causes, Federal Reserve actions, and planning.
2909179917	3/29/2022	Pruco Life Insurance Company	Advanced Roth Strategies (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses using annuities to reduce Roth IRA risk, taxation changes, and advanced Roth strategies.
2909179917	3/29/2022	Pruco Life Insurance Company	Advanced Roth Strategies	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses using annuities to reduce Roth IRA risk, taxation changes, and advanced Roth strategies.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

2931529770	3/29/2022	Independent Insurance Agents' Association of Montana	Agent Friendly Endorsements for CGL and BAC Forms	Property & Casualty	General: 2	The course addresses product knowledge of property and casualty insurance. Discusses unauthorized entities, business auto, drone, liquor and additional insured liability and cyber liability.
3870776650	3/29/2022	Pruco Life Insurance Company	12 IRA Mistakes: Help Your Clients Avoid Common and Costly IRA Pitfalls (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses contribution, rollover and distribution mistakes, beneficiary errors and Roth IRA mistakes.
3870776650	3/29/2022	Pruco Life Insurance Company	12 IRA Mistakes: Help Your Clients Avoid Common and Costly IRA Pitfalls	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses contribution, rollover and distribution mistakes, beneficiary errors and Roth IRA mistakes.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

4017353416	3/29/2022	Pruco Life Insurance Company	Managing Risks in the Retirement Red Zone: Seven Risks to Retirement Income (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses retirement income planning, creating lifetime income, variable annuities with lifetime benefits.
4017353416	3/29/2022	Pruco Life Insurance Company	Managing Risks in the Retirement Red Zone: Seven Risks to Retirement Income	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses retirement income planning, creating lifetime income, variable annuities with lifetime benefits.
311165137	3/30/2022	CEU Institute, Inc.	Ultimate Account Manager Seminar: Module Three Personal Insurance (6 hr) Webinar	Property & Casualty	General: 6	The course addresses product knowledge of property and casualty insurance. Discusses underwriting, ACORD application forms, rating, exposures, risks, coverage comparisons, personal coverage issues, and insuring technology.
311165137	3/30/2022	CEU Institute, Inc.	Ultimate Account Manager Seminar: Module Three Personal Insurance (6 hr)	Property & Casualty	General: 6	The course addresses product knowledge of property and casualty insurance. Discusses underwriting, ACORD application forms, rating, exposures, risks, coverage comparisons, personal coverage issues, and insuring technology.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

311165137	3/30/2022	CEU Institute, Inc.	Ultimate Account Manager Seminar: Module Three Commercial Insurance (6 hr) Webinar	Property & Casualty	General: 6	The course addresses product knowledge of property and casualty insurance. Discusses commercial policy underwriting, ACORD application forms, rating, exposures, risks, additional insureds, coverage comparisons, contract review, coverage issues, and insuring technology.
311165137	3/30/2022	CEU Institute, Inc.	Ultimate Account Manager Seminar: Module Three Commercial Insurance (6 hr)	Property & Casualty	General: 6	The course addresses product knowledge of property and casualty insurance. Discusses commercial policy underwriting, ACORD application forms, rating, exposures, risks, additional insureds, coverage comparisons, contract review, coverage issues, and insuring technology.
2028050545	3/30/2022	Pruco Life Insurance Company	Market and Economic Perspectives (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance and annuities and management. Discusses risk, equities, and fixed income products, and tax deferral.
2028050545	3/30/2022	Pruco Life Insurance Company	Market and Economic Perspectives	Life	General: 1	The course addresses product knowledge of life insurance and annuities and management. Discusses risk, equities, and fixed income products, and tax deferral.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

2237668750	3/30/2022	Pruco Life Insurance Company	The Whys Use of VUL (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses variable universal life insurance, benefits, and types of products.
2988371915	3/30/2022	Pruco Life Insurance Company	The Whys Use of VUL	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses variable universal life insurance, benefits, and types of products.
974872145	3/31/2022	DF Institute, dba Kaplan Financial	Commercial Auto Coverage, 12th Edition	Adjuster	General: 11	NAIC uniform submission, 11 computer-based, self study credit hours approved by Illinois. Discusses the commercial package and auto policies, business auto coverage, liability and physical damage coverage, conditions and endorsements, and the auto dealer coverage forms.
1307771585	3/31/2022	Pruco Life Insurance Company	The Roadmap to Retirement	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses retirement strategies and opportunities at age 50, 55, 59 1/2, 62, 65, and 70 1/2.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

1526567459	3/31/2022	Pruco Life Insurance Company	The Roadmap to Retirement (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses retirement strategies and opportunities at age 50, 55, 59 1/2, 62, 65, and 70 1/2.
3316872948	3/31/2022	Pruco Life Insurance Company	Professional Ethics: Doing Business the Right Way (Webinar)	Ethics	Ethics: 3	The course addresses ethics. Discusses ethics fundamentals, professional ethics in financial services an insurance industries, and three case studies.
3316872948	3/31/2022	Pruco Life Insurance Company	Professional Ethics: Doing Business the Right Way	Ethics	Ethics: 3	The course addresses ethics. Discusses ethics fundamentals, professional ethics in financial services an insurance industries, and three case studies.
4180241869	3/31/2022	Pruco Life Insurance Company	Professional Ethics: Doing Business the Right Way (2 hr)	Ethics	Ethics: 2	The course addresses ethics. Discusses ethical decision-making, ethical sales practices, recommendation standards, and two case studies.
53369454	4/1/2022	Pruco Life Insurance Company	The Intergenerational Divide: Having the Critical Conversations on Legacy Planning and Wealth Transfer	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses wealth transfer, asset retention, discussing legacy value, estate and gift taxation, and estate planning.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

327777445	4/1/2022	Hudson Insurance Company	2023 Livestock Gross Margin Training Webinar	Property & Casualty	General: 3	NAIC Uniform submission, 3 web-based classroom credit hours approved by Kansas. Discusses the livestock gross margin coverage program, coverages and limits, swine, dairy and feeder cattle processes, handbooks and forms.
576413914	4/1/2022	National Association of Insurance and Financial Advisors Montana	Three Hats Approach to Successfully Meeting The Client's Needs	Ethics	Ethics: 1	The course addresses ethics. Discusses uniform practices, identifying client-appropriate products and ethical behavior.
791160729	4/1/2022	Hudson Insurance Company	2023 Intro to Crop Insurance: Intermediate, webinar	Property & Casualty	General: 3	NAIC Uniform submission, 3 web-based classroom credit hours approved by Kansas. Discusses plans of coverage, valid signatures, legal description, farm unit structure, actual production history, and federal program deadlines.
1219400430	4/1/2022	Hudson Insurance Company	2023 Intro to Crop Insurance: Advanced Webinar	Property & Casualty	General: 3	NAIC Uniform submission, 3 web-based classroom credit hours approved by Kansas. Discusses actual production history, limitations and policy exceptions, determining production, and claims.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

1486777672	4/1/2022	Hudson Insurance Company	2023 Livestock Update Training Webinar	Property & Casualty	General: 3	NAIC Uniform submission, 3 web-based classroom credit hours approved by Kansas. Discusses livestock risk protection and livestock gross margin coverages and terminology, dairy revenue protection, and livestock price reinsurance agreements.
1535055392	4/1/2022	CEU Institute, Inc.	The Upward Spiral Part I: Using Neuroscience to Enhance Resilience and Wellbeing (1hr) Webinar	Adjuster	General: 1	The course addresses product knowledge of casualty and disability insurance. Discusses micro changes to brain activity and stimulation to assist in claimant recuperation.
1820368689	4/1/2022	Hudson Insurance Company	2023 Livestock Risk Protection Training Webinar	Property & Casualty	General: 3	NAIC Uniform submission, 3 web-based classroom credit hours approved by Kansas. Discusses livestock risk protection coverage, policy features versus endorsements, and the application process.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

2126929127	4/1/2022	Hudson Insurance Company	2023 Dairy Revenue Protection Training Webinar	Property & Casualty	General: 3	NAIC Uniform submission, 3 web-based classroom credit hours approved by Kansas. Discusses the dairy revenue protection policy, named insureds, classes and components, and the reinsurance agreement.
2277393335	4/1/2022	Pruco Life Insurance Company	Retirement Planning Strategies for Social Security and Medicare (Webinar)	Life	General: 1	The course addresses product knowledge of social insurance. Discusses individual and spousal Social Security benefits, and Medicare Parts A, B, C, D and F.
2277393335	4/1/2022	Pruco Life Insurance Company	Retirement Planning Strategies for Social Security and Medicare	Life	General: 1	The course addresses product knowledge of social insurance. Discusses individual and spousal Social Security benefits, and Medicare Parts A, B, C, D and F.
2498180097	4/1/2022	Hudson Insurance Company	2023 Intro to Crop Insurance: Basics Webinar	Property & Casualty	General: 3	NAIC Uniform submission, 3 web-based classroom credit hours approved by Kansas. Discusses federal crop insurance program requirements and terminology, the policy flow and documents.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

2507900197	4/1/2022	Hudson Insurance Company	2022 Acreage Report Training Webinar	Property & Casualty	General: 2	NAIC Uniform submission, 2 web-based classroom credit hours approved by Kansas. Discusses elements of acreage reporting and requirements, acreage types and revisions,
2869469420	4/1/2022	ALPS (Attorneys Liability Protection Society) Corporation	Insurance Operations – Policy Administration System Training	Property & Casualty	General: 2	The course addresses management. Discusses policy administration, operational policy and claim review, documentation and reports.
3026801351	4/1/2022	National Association of Insurance and Financial Advisors Montana	The Third Hat and The Big Three	Life	General: 1	The course addresses product knowledge of life and casualty insurance and management. Discusses knowing the product, reducing liability risk, needs-based approach, and retirement protection.
3142845565	4/1/2022	RegEd, Inc.	Montana Insurance Law: MT A Guide to Changes & Updates, 6th Edition	MT Legislative Changes	MT Legislative Changes: 1	The course addresses insurance law. Discusses legislative changes to Montana insurance statutes during the 2021 legislative session with House bills 117, 195, 379, and 383 and Senate bills 31, 101, 149, 216, 217, 363, and 395.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

3631561841	4/1/2022	Pruco Life Insurance Company	What Matters Most: Strategies to Build Financial Confidence for Today's Women	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses retirement, healthcare and social security planning, coverage and needs.
3894534632	4/1/2022	Hudson Insurance Company	2023 Livestock Update Training	Property & Casualty	General: 3	NAIC Uniform submission, 3 web-based classroom credit hours approved by Kansas. Discusses livestock risk protection and livestock gross margin coverages and terminology, dairy revenue protection, and livestock price reinsurance agreements.
4172385798	4/1/2022	Hudson Insurance Company	2023 Intro to Crop Insurance: Expert Webinar	Property & Casualty	General: 3	NAIC Uniform submission, 3 web-based classroom credit hours approved by Kansas. Discusses specialty crops and insurance plans, options, endorsements, rates and coverages.
1729459947	4/4/2022	CEU Institute, Inc.	The Upward Spiral Part II: The Body and the Brain (1 HR) Webinar	Adjuster	General: 1	The course addresses product knowledge of disability and casualty insurance. Discusses assisting the body in injury healing, depressive and sleep therapies.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

2322750759	4/5/2022	Professional Insurance Agents (PIA) of Montana	Ethical Issues and Responsibilities	Ethics	Ethics: 3	The course addresses ethics. Discusses ethical behavior, societal expectations, ethical checklist, legal and ethical client relationship, and duty to protect.
3725421621	4/5/2022	CEU Institute, Inc.	The Upward Spiral Part III: The Mind and the Brain (1hr) Webinar	Adjuster	General: 1	The course addresses product knowledge of disability and casualty insurance. Discusses stress and brain changes, modifying stressors and injury healing.
2000131169	4/6/2022	Jackson National Life, Inc.	Protect Your Practice Through Income Generation	Life	General: 1	The course addresses product knowledge of life insurance and annuities and management. Discusses retirement income planning, compliance, withdrawal rate recommendations to improve lifetime income.
2154118473	4/6/2022	Jackson National Life, Inc.	Protect Your Practice Through Income Generation (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance and annuities and management. Discusses retirement income planning, compliance, withdrawal rate recommendations to improve lifetime income.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

3183435358	4/6/2022	Consolidated Educational Services, Inc.	Annuity Review: What Worked Then, May Not Now webinar	Life	General: 1	NAIC Uniform submission, 1 web-based classroom credit hour approved by Alabama. Discusses annuity contracts, income riders, ownership benefits, and client income opportunities.
4236375702	4/6/2022	ACUITY, a Mutual Insurance Company	CLASSROOM RETAIL COVERAGES	Property & Casualty	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Wisconsin. Discusses coverages for retailers, classifications, types of risk, wholesaler exposures, and claims.
569828455	4/7/2022	CEU Institute, Inc.	Consolidated Appropriations Act of 2021 (2 hr) Webinar	Life	General: 2	The course addresses product knowledge of disability insurance, insurance law and management. Discusses federal regulations, insured billing protections, out-of-pocket and emergency service coverages, qualified payments, median contract rate, required disclosures, independent dispute resolution and regional indexing.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

3565191898	4/7/2022	Montana Land Title Association	2021 Legislative Changes	MT Legislative Changes	MT Legislative Changes: 1	The course address changes to Montana insurance statutes. Discusses 2021 insurance legislative changes made in House bills 43, 117, 195, 198, 290 and 379 and Senate bills 28, 76, 101, 149, 363 and 395 and securities legislative changes in House bills 64, 65 and 66.
3565191898	4/7/2022	Montana Land Title Association	MLTA 2022 Spring Ed - Ethics Ethics		Ethics: 2	The course addresses ethics. Discusses ethical issues in three case studies.
3565191898	4/7/2022	Montana Land Title Association	MLTA 2022 Spring Ed - Title Friday		General: 2	The course addresses product knowledge of title insurance. Discusses water rights an property ownership, and remote on-line notarization.
3565191898	4/7/2022	Montana Land Title Association	MLTA 2022 Spring Ed - Title Thursday		General: 8	The course addresses product knowledge of title insurance. Discusses native American land issues, claim avoidance, underwriting, marijuana and property in Montana, covenant issues, and de-titling manufactured homes.

Montana Insurance Continuing Education Advisory Council meeting - April 20, 2022

3855332815	4/7/2022	Professional Liability Underwriting Society (PLUS)	RPLU C03 Professional Liability Insurance: Introduction	Property & Casualty	General: 12	NAIC Uniform submission, 12 computer-based, self study credit hours approved by Minnesota. Discusses commercial general liability, professional liability, policy conditions, coverages and exclusions.	
119635767	4/8/2022	National Association of Health Underwriters	Corporate Wellness Certification	Disability (Health)	General: 3	NAIC Uniform submission, web-based classroom credit hours approved by Illinois. Discusses employer sponsored wellness plans, healthcare cost reductions, data limitations, program implementation and compliance.	
728444588	4/8/2022	Avantax Planning Partners, Inc.	2022 Avantax Planning Partners Conference - Day 3	Annuity Suitability	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Iowa. Discusses multi-generational planning using annuities, and regulatory compliance. The course is scheduled May 26, 2022.	
728444588	4/8/2022	Avantax Planning Partners, Inc.	2022 Avantax Planning Partners Conference - Day 2	Annuity Suitability	General: 8	NAIC Uniform submission, 6 classroom credit hours approved by Iowa. Discusses workforce trends and group coverages, global markets, solutions for business owners, inflation and retirement income effects, real estate investing and taxation.	course only eligible for 6 credit hours

1420796145	4/9/2022	LearnTitle.com, LLC	MT ALTA Forms	Title	General: 1	NAIC Uniform submission, 1 computer-based, self study credit hour approved by Alabama. Discusses new American Land Title forms, covered risks, exclusions, conditions and definitions.
------------	----------	---------------------	---------------	-------	------------	--

Individual Course Submissions

	4/11/2022	Daniel Shepherd	Vehicle Theft versus Fraud, Rimkus Consulting Group, Inc.	Property & Casualty	General: 1	The course addresses product knowledge of property and casualty insurance. Discusses high-tech vehicle theft, key fob security, types of damage through theft, protecting fob codes, and fraud indicators. The course was held March 9, 2022.
--	-----------	-----------------	---	---------------------	------------	---