

**Insurance Continuing Education Advisory Council
Meeting Minutes, April 20, 2022**

The meeting of the Insurance Continuing Education Advisory Council was called to order at 9:33 a.m. on 4/20/22.

CSI Staffing Announcement

David Dachs discussed the e-mail blast notification of licensees regarding pre-licensing fingerprinting. Pearson Vue testing sites no longer provide fingerprinting for background check purposes to prospective licensees. Candidates may have the required fingerprinting performed by local law enforcement and several private vendors. Instructions and sample forms are on the website at: <https://csimt.gov/wp-content/uploads/Fingerprints-for-Insurance-Licensing-Purposes.pdf>

Members Present

David Dachs, State Auditor's Office non-voting member and meeting chair
Misty Kriskovich, Independent Insurance Agents of Montana member
Chris Campbell, Professional Insurance Agents of Montana member
Bob Sewell, Title Insurance member
Dan Rust, National Association of Insurance and Financial Advisors Montana member
Ric Holden, adjuster member

Members Absent

DeAnna Anderson

Staff Present

Bob Biskupiak, Deputy Commissioner of Insurance
Mary Arnold

Members of the Public

None present

Approval of Minutes

Dan Rust moved to approve the corrected March 16, 2022, minutes. Ric Holden seconded the motion. The motion was approved unanimously.

Presentation of Course Summaries

Course information was distributed by e-mail to all Advisory Council members in advance. Mary Arnold discussed the volume of courses submitted by the newly approved course provider Pruco Life Insurance Company; the discrepancy between requested credit and the credit allowed for the NAIC uniform submission Avantax Planning Partners, Inc. course, 2022 Avantax Planning Partners Conference - Day 2, on page 57 of the new course summaries; and the Pruco Life Insurance Company course, Financial Professionals Guide to Charitable Planning Opportunities, on page 39 of the course summaries.

Public Comment

No public comment.

Discussion of Course Summaries

Dan Rust moved approval of the course submissions as presented. Bob Sewell seconded the motion. Motion for course approval was passed unanimously.

Other discussion items

Bob Biskupiak inquired if course submissions tend to be fairly level throughout the year. Mary Arnold stated that the submissions often ebb and flow, often due to changing providerships. She further commented that in addition to the new course submissions, there are course renewals made by providers wishing to continue existing approvals.

Chris Campbell asked if course renewal is annual. Mary Arnold stated that course approval is effective for two years from the original effective date.

Next Meeting

Wednesday, May 18, 2022 – 9:30 a.m., Advisory Council meeting, Zoom

Adjournment

Bob Sewell moved to adjourn, and Chris Campbell seconded the motion. Meeting adjourned at 9:45 am. a.m.