

Montana Insurance Continuing Education Advisory Council meeting - August 17, 2022

Transaction Number	Transaction Date	Provider Name	Course Name	Course Group	Credits	Course Summary
4266083144	5/24/2022	WebCE, Inc.	Ethical Business Practices: Diversity, Equity, and Inclusion	Ethics	Ethics: 1	NAIC Uniform submission, requested written 1 computer-based, self study confirmation the credit hour approved by licensees seeking Texas. Discusses unfair Montana credit discrimination, eliminating must complete the bias in ethical decision-making, and the importance of diversity and equity in insurance ethics. course in its entirety for credit. Completion solely of the final examination does not constitute creditable course completion.
3188899723	7/7/2022	Allied Universal Compliance and Investigations formerly G4S Compliance & Investigations	FRAUD AWARENESS FOR INSURANCE PROFESSIONALS	Adjuster	General: 2	The course addresses 1/2 hour of management. Discusses internal business anti-fraud regulation and process, not fraud awareness, the Allied continuing education, sent Allied special notice, offered 1 investigations unit credit hour, procedures and agreement from organization, fraud course provider detection and trends, California and Florida fraud reporting requirements, and red flags.

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3188899723	7/7/2022	Allied Universal Compliance and Investigations formerly G4S Compliance & Investigations	PROPERTY INSURANCE FRAUD AWARENESS	Adjuster 1	General: The course addresses product knowledge of property insurance. Discusses regulatory reporting and compliance, types of fraud and abuse, claims and investigation, reg flags, catastrophe fraud and four case studies.	
3188899723	7/7/2022	Allied Universal Compliance and Investigations formerly G4S Compliance & Investigations	UNDERSTANDING LOW IMPACT CLAIMS	Adjuster 1	General: The course addresses property and casualty insurance and management. Discusses low impact auto accident claims, fraudulent claimants, claim investigation process and provider billing fraud.	multiple methods of course offering listed, 7/15/22 received inquiry regarding Course processing, supplied previous message of 7/11/22 request for required submission materials, hold for August meeting, webinar

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3188899723	7/7/2022	Allied Universal Compliance and Investigations formerly G4S Compliance & Investigations	MEDICAL CANVASSING	Adjuster 1	General: The course addresses disability insurance and management. Discusses conducting a medical canvass during claim handling, canvassing methods and procedures, report elements, resulting information and HIPAA/HITECH compliance.
1280008131	7/13/2022	5th Gear Enterprises	Marijuana in Insurance	Property & Casualty	General: NAIC Uniform submission, 2 computer-based, self study credit hours approved by Oregon. Discusses marijuana historically, public opinion changes, obstacles to cannabis-related industry and business, marijuana and property insurance, marijuana and life/health insurance, and industry-specific policies.

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1159364760	7/14/2022	CAPE School (Commonwealth Academy of Professional Education)	Montana Legislative Updates 2022	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 43, 63, 80, 117, 195, 229, 290, 291, 292, and 379, and Senate bills 28, 76, 149, 155, 216, 217, 363, 364, and 395.	Revise title to reflect 2021 legislative actions
2182983813	7/14/2022	Pruco Life Insurance Company	The Perfect Storm for Retirement Planning (Webinar)	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses financial and retirement plan review, the effect of market volatility on retirement strategies, federal legislation affecting retirement monies, and retirement income risks.	

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2182983813	7/14/2022	Pruco Life Insurance Company	The Perfect Storm for Retirement Planning	Life	General: 1	The course addresses product knowledge of life insurance and annuities. Discusses financial and retirement plan review, the effect of market volatility on retirement strategies, federal legislation affecting retirement monies, and retirement income risks.	
2848305215	7/14/2022	Montana State Compensation Insurance Fund	Legal Hodgepodge	Pre Paid Legal	General: 1	The course addresses product knowledge of disability insurance. Discusses HIPAA confidentiality requirements, bad faith in health claims, federal penalties and fees.	sent message and received agreement to revise course group to Disability (health)

3625163922	7/14/2022	CEU Institute, Inc.	AASC Fall Conference 2022 (13hr) Webinar	Disabilit y (Health)	General: 13	The course addresses product knowledge of disability and casualty insurance and management. Discusses lien resolution, personal injury and non-personal injury settlement planning, mediation, Medicare and Medicaid, consultant ethics, navigating client trauma, securities licensing, regulatory updates and three case studies. The American Association of Settlement Consultants conference is scheduled September 12-13, 2022.
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3625163922	7/14/2022	CEU Institute, Inc.	AASC Fall Conference 2022 (13hr)	Disability (Health)	General: 13	The course addresses product knowledge of disability and casualty insurance and management. Discusses lien resolution, personal injury and non-personal injury settlement planning, mediation, Medicare and Medicaid, navigating client trauma, securities licensing, regulatory updates and three case studies. The American Association of Settlement Consultants conference is scheduled September 12-13, 2022.
3625163922	7/14/2022	CEU Institute, Inc.	AASC Fall Conference 2022 (1hr) (Ethics) Webinar	Ethics	Ethics: 1	The course addresses ethics. Discusses ethical behavior in settlement consultants, moral development, ethics and laws, ethical duties to injured parties, insurers and lawyers, and professional conduct. This course is scheduled September 13, 2022.

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3625163922	7/14/2022	CEU Institute, Inc.	AASC Fall Conference 2022 (1hr) (Ethics)	Ethics	Ethics: 1	The course addresses ethics. Discusses ethical behavior in settlement consultants, moral development, ethics and laws, ethical duties to injured parties, insurers and lawyers, and professional conduct. This course is scheduled September 13, 2022.
949562154	7/15/2022	First American Title Insurance Company	Weather Alert: Sunny with a Chance of Fraud	Title	General: 1	The course addresses product knowledge of title insurance. Discusses foreign party transactions and fraud, digital exposures and protecting all parties, click baiting, emerging fraud trends, red flags, independent confirmation to reduce fraud traps and underwriter consultation.

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1940975612	7/15/2022	First American Title Insurance Company	Native American Lands Recent Developments	Title	General: 1 The course addresses product knowledge of title insurance. Discusses the Land Title Records Office in the federal Bureau of Indian Affairs, federal program and policy updates, three legal cases affecting Native American land rights, and the McGirt case effect on ALTA 47 series endorsements.
3777275576	7/15/2022	Equitable Financial Life Insurance Company, formerly AXA Equitable Life Insurance Company	Four Stages of Annuity Income (Webinar)	Life	General: 1 The course addresses product knowledge of life insurance and annuities. Discusses annuity income distributions, when to take distributions, age-related taxation and penalties from distributions and beneficiary distribution options.

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1699497882	7/17/2022	National Alliance for Insurance Education and Research	Errors & Omissions (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses agency loss prevention, errors and omissions prevention structure, types of errors, risk management, implementing loss control programs, and benefits of loss control.
1699497882	7/17/2022	National Alliance for Insurance Education and Research	Errors & Omissions (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses agency loss prevention, errors and omissions prevention structure, types of errors, risk management, implementing loss control programs, and benefits of loss control.

4175493596	7/18/2022	Farmers Mutual Hail Insurance Company of Iowa	2023 PRF API Training- Webinar	Property & Casualty	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Iowa. Discusses crop policies that address rainfall indices, pasture, rangeland and forage, apiculture, federal form and policy filing requirements, claims and quoting requirements.
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2989204442	7/19/2022	Pilot Catastrophe Services, Inc.	Commercial Property Complex General Adjuster Training - 3.5 Day	Adjuster General:	28	NAIC Uniform submission, 28 classroom credit hours approved by Alabama. Discusses complex large loss handling for commercial property, catastrophe large loss claims, challenges and methods in approaching large commercial property claims, research and pre-contact practices, elements of the policy and endorsements, inspections and inspection experts, commercial building vocabulary, and six case study exercises.
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3829818395	7/19/2022	The Cincinnati Insurance Company	CSU E&S School	Property & Casualty	6	General: The course addresses product knowledge of property and casualty insurance. Discusses the excess and surplus market, professional liability insurance products, construction coverages, product placement, emerging market and exposures, and claims.
1134881392	7/20/2022	Pilot Catastrophe Services, Inc.	Ethics in Auto Adjusting	Adjuster	3	General: NAIC Uniform submission, 3 classroom ethics credits approved by Alabama. Discusses unfair claims act, ethical duties and obligations, ethical behavior, proper claim handling, and two role play scenarios.

1134881392	7/20/2022	Pilot Catastrophe Services, Inc.	Auto Adjuster Academy 2 Day	Adjuster General:	13	NAIC Uniform submission, 13 classroom auto credits approved by Alabama. Discusses basic element of an auto insurance policy, parties to the contract, coverage and inspections, vehicle identification, estimating repairs, repair time and dent repair.
1629698349	7/21/2022	Land Title Institute	RESPA Compliance: Understanding Things of Value and Referrals	Title	General:	1 The course addresses product knowledge of title insurance. Discusses the federal Real Estate Settlement Procedures Act, prohibitions and exemptions in Section 8 of the Act, compliance and advertising versus marketing.

3048518227	7/22/2022	CEU Institute, Inc.	Medicare and Medicare Set Asides – Misconceptions, Realities & Beyond (1hr) Webinar	Adjuster	General: 1	The course addresses product knowledge of social insurance. Discusses Medicare, Medicare set-asides and secondary payer, workers compensation and medical set-asides, CMS policies, procedures and actions, settling practices, medical set-aside administration, Medicare denials, professional administration of medical claims, self-administration and administration barriers.
3923210888	7/22/2022	National Alliance for Insurance Education and Research	Emerging Risks in Changing Times (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses the impact of emerging risks on insurance, insurance coverages, examples of emerging risk and coverage impact, crisis events and three case studies.

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3923210888	7/22/2022	National Alliance for Insurance Education and Research	Emerging Risks in Changing Times (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses the impact of emerging risks on insurance, insurance coverages, examples of emerging risk and coverage impact, crisis events and three case studies.
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922741097	7/26/2022	National Alliance for Insurance Education and Research	Directors & Officers Liability (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses directors and officers exposures, types of entities and boards, directors and officers coverage in homeowners and umbrella, commercial general liability, business auto excess and professional liability policies, legal concepts, directors and officer liability policy, insuring agreement, exclusions and other considerations.
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922741097	7/26/2022	National Alliance for Insurance Education and Research	Directors & Officers Liability (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses directors and officers exposures, types of entities and boards, directors and officers coverage in homeowners and umbrella, commercial general liability, business auto excess and professional liability policies, legal concepts, directors and officer liability policy, insuring agreement, exclusions and other considerations.
513070281	7/27/2022	National Underwriter Company	Motor Truck Cargo Insurance & The Carmack Amendment - webinar	Property & Casualty	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Kentucky. Discusses the federal Carmack Amendment, motor carrier legal liability property coverage, shipper versus motor carrier liability, and claims and exceptions.

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513070281	7/27/2022	National Underwriter Company	Motor Truck Cargo Insurance & The Carmack Amendment	Property & Casualty	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Kentucky. Discusses the federal Carmack Amendment, motor carrier legal liability property coverage, shipper versus motor carrier liability, and claims and exceptions.
666406604	7/27/2022	National Alliance for Insurance Education and Research	Doing the Right Thing: Ethics for Insurance Producers (Webinar)	Ethics	Ethics: 4	NAIC Uniform submission, 4 classroom ethics credit hours approved by Texas. Discusses law versus ethics, ethical decision-making, rule-versus people-based decision-making, insurance producer responsibilities, agency and fiduciary responsibilities, and standards of care.

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666406604	7/27/2022	National Alliance for Insurance Education and Research	Doing the Right Thing: Ethics for Ins Pro (Classroom)	Ethics	Ethics: 4	NAIC Uniform submission, 4 classroom ethics credit hours approved by Texas. Discusses law versus ethics, ethical decision-making, rule-versus people-based decision-making, insurance producer responsibilities, agency and fiduciary responsibilities, and standards of care.
1291136127	7/27/2022	Rural Community Insurance Company	2023 Fall Agent Crop Insurance Course - Webinar	Property & Casualty	General: 4	The course addresses product knowledge of property and casualty insurance. Discusses the application and renewal process, actual production history, actuarial updates, federal compliance, written agreement updates, 2023 program updates, claims, margin protection, and precision agriculture.

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2007473946	7/27/2022	@ Your Pace Online, LLC	@ Your Pace Online's Legislative Updates	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, 229, 283, 290, and 446, and Senate bill 363	discussed with provider and received response regarding course title revision to "@ Your Pace Online's Montana 2021 Legislative Updates"
2353856823	7/27/2022	CEU Institute, Inc.	The Gavel National Conference VII 1hr (Ethics)	Ethics	Ethics: 1	The course addresses ethics. Discusses definitions the role of the adjuster, unethical behavior, penalties, guidelines, claim settlement and standards of conduct. This is one of multiple sessions scheduled January 17, 2023 at 10:15 am.	

2353856823	7/27/2022	CEU Institute, Inc.	The Gavel National Conference Adjuster VII (10hr)	General: 10	The course addresses product knowledge of property, disability, and casualty insurance and management. Discusses dispute resolution, medical expenses, alcohol and dram shop liability, multidefendant litigation, legal and trial methods, construction liability, land and mud slide investigation, expert witnesses, global claims, life care plans, emerging insurance issues, reservations of rights and battery failure investigation. The course includes three or four concurrent courses during nine sessions January 16-18, 2023.
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2353856823	7/27/2022	CEU Institute, Inc.	The Gavel National Conference Adjuster VII (9hr)	General: 9	The course addresses product knowledge of property, disability, and casualty insurance and management. Discusses dispute resolution, medical expenses, alcohol and dram shop liability, multidefendant litigation, legal and trial methods, expert witnesses, global claims, life care plans, emerging insurance issues, reservations of rights and battery failure investigation. The course includes three or four concurrent courses during eight sessions. The course is scheduled January 16-18, 2023.
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391830549	7/28/2022	AgriSompo North America Inc.	Whole Farm Revenue Protection Webinar	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Texas. Discusses 2023 changes to the Whole Farm Revenue Protection policy, coverage, eligibility, required forms, underlying multi-peril crop insurance coverage, the farm operation report, expected value and yield, claims and losses, indemnity and marketing contract requirements.
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391830549	7/28/2022	AgriSompo North America Inc.	Whole Farm Revenue Protection	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Texas. Discusses 2023 changes to the Whole Farm Revenue Protection policy, coverage, eligibility, required forms, underlying multi-peril crop insurance coverage, the farm operation report, expected value and yield, claims and losses, indemnity and marketing contract requirements.	
880154929	7/28/2022	United Insurance Educators, Inc.	UIECE PC Professional - Ethics (CBT)	Ethics	Ethics: 3	The course addresses ethics. Discusses professional conduct, suitability standards, ethical sales, due diligence, business ethics, explaining policy limitations, and codes of ethics.	e-mailed regarding course completion requirements, provider is correcting issue

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880154929	7/28/2022	United Insurance Educators, Inc.	UIECE PC Professional (CBT)	Property & Casualty	General: 20	The course addresses product knowledge of property and casualty insurance. Discusses the agent role, employment practices liability, FEMA Flood insurance, hurricane insurance, commodity and crop insurance, auto and homeowner's insurance.	e-mailed regarding course completion requirements, provider is correcting issue
924946588	7/28/2022	National Alliance for Insurance Education and Research	Homeowners Tricks & Traps (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses other structures on premises, miscellaneous vehicles, liability for persons hired and children at school.	
924946588	7/28/2022	National Alliance for Insurance Education and Research	Homeowners Tricks & Traps (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses other structures on premises, miscellaneous vehicles, liability for persons hired and children at school.	

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2499501897	7/28/2022	United Insurance Educators, Inc.	UIECE PC Professional Ethics (Self-Study)	Ethics	Ethics: 3	The course addresses ethics. Discusses professional conduct, suitability standards, ethical sales, due diligence, business ethics, explaining policy limitations, and codes of ethics.	text-based offering
2499501897	7/28/2022	United Insurance Educators, Inc.	UIECE PC Professional (Self-Study)	Property & Casualty	General: 20	The course addresses product knowledge of property and casualty insurance. Discusses the agent role, employment practices liability, FEMA Flood insurance, hurricane insurance, commodity and crop insurance, auto and homeowner's insurance.	text-based offering
2714158423	7/28/2022	National Alliance for Insurance Education and Research	A Problems and Solutions Approach to Auto Ins (Webinar)	Property & Casualty	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses rental car exposures, and furnished vehicle exposures.	

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2714158423	7/28/2022	National Alliance for Insurance Education and Research	A Problems and Solutions Approach to Auto Ins (Classroom)	Property & Casualty	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses rental car exposures, and furnished vehicle exposures.
2714158423	7/28/2022	National Alliance for Insurance Education and Research	A Problems and Solutions Approach to Homeowners (Webinar)	Property & Casualty	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses homeowners insurance business exposures, and contractual liability coverage under the homeowners policy.
2714158423	7/28/2022	National Alliance for Insurance Education and Research	A Problems and Solutions Approach to Homeowners (Classroom)	Property & Casualty	General: 2	NAIC Uniform submission, 2 classroom credit hours approved by Texas. Discusses homeowners insurance business exposures, and contractual liability coverage under the homeowners policy.

409299107	7/29/2022	CEU Institute, Inc.	Ocular Trauma	Adjuster 1	General: The course addresses product knowledge of casualty and disability insurance. Discusses accidental eye injury, work-related ocular trauma, types of treatable injury, traumatic optic neuropathy and injury prevention.
2236719590	7/29/2022	CEU Institute, Inc.	Diagnosis and Treatment of Traumatic Brain Injuries	Adjuster 1	General: The course addresses product knowledge of casualty and disability insurance. Discusses types of brain injury, traumatic versus acquired brain injury, categories and causes of each injury type, injury classification, and psychological or cognitive issues following injury.

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1794205752	7/31/2022	National Association of Insurance and Financial Advisors Montana	Impaired Risk Underwriting	Disability (Health)	General: 1	The course addresses disability insurance and management. Discusses conditions affecting policy underwriting, medical conditions, emotional conditions, physical condition, drug usage, and aging disabilities.
2561296786	7/31/2022	National Association of Insurance and Financial Advisors Montana	Errors and Omissions	Ethics	Ethics: 1	The course addresses ethics. Discusses case reviews of insurance advising practices, correcting assumptions and miscommunications, confirmation and documentation, insurable interest determination and best practices.
4096950029	7/31/2022	National Association of Insurance and Financial Advisors Montana	Where the Rubber Meets the Road - Disability Income Claims for Your Clients	Disability (Health)	General: 1	The course addresses product knowledge of disability insurance. Discusses types of disability insurance, group versus individual coverage, disability income claims and two case studies.

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425588233	8/1/2022	National Alliance for Insurance Education and Research	Additional Insured vs Named Insured Debate (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses who is an insured, first named versus named insured rights and obligations, additional insureds, commercial general liability, commercial property, and business auto policy insureds, the effect of entity type on named insureds, and one case study.
580065692	8/1/2022	National Alliance for Insurance Education and Research	Personal & Commercial Auto Issues (Webinar)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses the business auto coverage form, business and personal exposures, using personal vehicles for work, personal auto policies, drive other care coverage, rental vehicles, and six case studies.

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580065692	8/1/2022	National Alliance for Insurance Education and Research	Personal & Commercial Auto Issues (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses the business auto coverage form, business and personal exposures, using personal vehicles for work, personal auto policies, drive other care coverage, rental vehicles, and six case studies.
1129531406	8/1/2022	National Alliance for Insurance Education and Research	Analyzing Cyber Liability (Webinar)	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Texas. Discusses cyber liability coverage, other cyber policy names, businesses that need cyber coverage, technology errors and omissions, errors and omissions versus cyber liability coverages, and characteristics of cyber liability policies.

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1129531406	8/1/2022	National Alliance for Insurance Education and Research	Analyzing Cyber Liability (Classroom)	Property & Casualty	General: 3	NAIC Uniform submission, 3 classroom credit hours approved by Texas. Discusses cyber liability coverage, other cyber policy names, businesses that need cyber coverage, technology errors and omissions, errors and omissions versus cyber liability coverages, and characteristics of cyber liability policies.
1583343809	8/1/2022	National Alliance for Insurance Education and Research	Ins. Solutions for Funding Retirement Goals (Webinar)	Life	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses retirement income decisions, risks funding sources, annuities, types of annuities for funding, long-term care insurance, permanent life insurance and indemnity plans versus reimbursement plans.

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1583343809	8/1/2022	National Alliance for Insurance Education and Research	Ins. Solutions for Funding Retirement Gls (Classroom)	Life	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses retirement income decisions, risks funding sources, annuities, types of annuities for funding, long-term care insurance, permanent life insurance and indemnity plans versus reimbursement plans.
2549885336	8/1/2022	American College (The)	HS 324 Legal Aspects of Life Insurance_ETH	Ethics	Ethics: 3	The course addresses ethics. Discusses ethical concerns for life insurance agents, conflicts of interest, the ethical use of policy illustrations, ethical behavior, and laws versus ethics.

2549885336	8/1/2022	American College (The)	HS 324 Legal Aspects of Life Insurance	Long Term Care	General: 21	The course addresses product knowledge of life insurance. Discusses insurance contracts and laws, insurer contract avoidance, the incontestable clause, policy provisions, rights and remedies, beneficiaries, creditor protection, advertising and privacy.	Topic is life insurance
2832796830	8/1/2022	Delaware Life Marketing, LLC	Estate Planning for Mass Affluent Clients	Life	General: 1	The course addresses product knowledge of title and life insurance and annuities. Discusses ownership and titling, joint ownership, right of survivorship, tenants in common, estate planning versus estate taxation, probate and beneficiaries.	

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1699769379	8/2/2022	CEU Institute, Inc.	Achieving Best Outcomes: New Technology in the Management of Spinal Cord Injury Webinar	Adjuster	General: 1	The course addresses product knowledge of disability and casualty insurance. Discusses classification of spinal cord injuries, grading muscle use, muscles of upper and lower extremities, surgical transfers of nerves and tendons, and the use of exoskeleton devices. This course is scheduled October 27, 2022.
3295427684	8/2/2022	National Alliance for Insurance Education and Research	CRM - Principles of Risk Management (Webinar)	Property & Casualty	General: 16	NAIC Uniform submission, 16 classroom credit hours approved by Texas. Discusses risk definitions and terms, organizational risk management programs, identifying risk, self-administered risk identification methods, financial statement review, and enterprise risk management.

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3295427684	8/2/2022	National Alliance for Insurance Education and Research	CRM - Principles of Risk Management (Classroom)	Property & Casualty	General: 16	NAIC Uniform submission, 16 classroom credit hours approved by Texas. Discusses risk definitions and terms, organizational risk management programs, identifying risk, self- administered risk identification methods, financial statement review, and enterprise risk management.
47299098	8/3/2022	American Equity Investment Life Insurance Company	Managing Income Risks in Retirement	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Iowa. Discusses retirement income, types of retirement income risks, and methods to curb income risk.

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47299098	8/3/2022	American Equity Investment Life Insurance Company	Managing Income Risks in Retirement	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Iowa. Discusses retirement income, types of retirement income risks, and methods to curb income risk.
436034207	8/3/2022	National Association of Insurance and Financial Advisors Montana	Client Service - 4 Ways to Improve by Doing Good	Ethics	Ethics: 1	The course addresses ethics. Discusses personal and fiduciary responsibilities, client service, and three case studies.
672669345	8/3/2022	Crop Risk Services, formerly ADM Crop Risk Services, Inc.	2023 Spring Agent Update-Webinar	Property & Casualty	General: 4	NAIC Uniform submission, 4 web-based classroom credit hours approved by Illinois. Discusses federal program standards, 2023 handbook and manual updates, policy provision revisions for 2023, production reporting changes, underwriting, policy endorsements, cover crops and conservation, and crop/hail policy changes.

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672669345	8/3/2022	Crop Risk Services, formerly ADM Crop Risk Services, Inc.	2023 Spring Agent Update- Classroom	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Illinois. Discusses federal program standards, 2023 handbook and manual updates, policy provision revisions for 2023, production reporting changes, underwriting, policy endorsements, cover crops and conservation, and crop/hail policy changes.
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748435442	8/3/2022	National Association of Insurance and Financial Advisors Montana	Student Loans and Financial Advisors in Today's World	Annuity General: Suitability 1	The course addresses product knowledge of life insurance and annuities. Discusses types of advanced education funding methods and devices, tools to assess the various loans and plans, Public Service Loan Forgiveness, elements of the Coronavirus Aid, Relief and Economic Security Act (CARES) that provide higher education relief, in-school loans and personal financing.
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2780737970	8/3/2022	National Alliance for Insurance Education and Research	CL Troubles & Solutions (Classroom)	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Texas. Discusses commercial lines risks and solutions, credit card and virtual currency exposures, earthquake, named insureds, commercial general liability policy trigger, the National Flood Insurance Program, personal and business auto exposures, and protective safeguards.
3723024821	8/3/2022	National Association of Insurance and Financial Advisors Montana	Direct Primary Care - Too Good to Be True?	Disabilit y (Health)	General:	The course addresses product knowledge of disability insurance. Discusses direct primary care versus concierge medicine, demand versus supply, legislative actions, direct primary care membership and benefits, and employer groups.

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473651351	8/4/2022	Northstar Educational Services	Life Insurance Underwriting Factors	Life	General: 2	The course addresses product knowledge of life insurance and management. Discusses the insurance risk determination process, life insurance underwriting guidelines, full underwriting of a life risk, levels of underwriting, underwriting for term versus whole life policies, guaranteed issue versus simplified issue policies, and the application process.
1928783023	8/4/2022	National Association of Health Underwriters	Empowering Health Through Food	Disability (Health)	General: 1	NAIC Uniform submission, 1 web-based classroom credit hour approved by Illinois. Discusses nutrition in prevention and treatment of non-communicable disease, the effect of foods in health, nutrient uptake, employee well-being, and social determinants.

3832488416	8/4/2022	INTERTEL, INC	Surveillance Alternatives in a Heightened Awareness	Property & Casualty	General: 1	The course addresses management. Discusses medical canvassing, legalities and ethics, types of canvassing, prior treatment, facility types, authority to request information, limits of medical canvassing, HIPAA requirements, and comparing demographics and treatment dates.
4219868040	8/4/2022	Northstar Educational Services	Social Security Retirement Update	Life	General: 1	The course addresses product knowledge of social insurance. Discusses the history of the Social Security program, types and extent of coverage, eligibility, dual benefits, benefit amounts and taxation of benefits and the program future.

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2755381542	8/5/2022	CEU Institute, Inc.	Ethics in Claims and Medical Case Management Webinar	Ethics	Ethics: 1	The course addresses ethics. Discusses professional codes of ethics, responsibility and competence, bad faith, assessing general business practice, and ethical business guidelines.
120399982	8/8/2022	CLM Group, Inc., dba Claims & Litigation Management Alliance	Premier Session 1- 2022 CLM Construction Conference	Adjuster	General: 1	The course addresses management. Discusses cybersecurity threats, malicious versus unintentional threats, the Internet of things, and phishing attacks.
1605966660	8/8/2022	Consolidated Educational Services, Inc.	Long Term Care Insurance & Longevity Planning Solutions Seminar	Life	General: 1	NAIC Uniform submission, 1 classroom credit hour approved by Alabama. Discusses long-term care concepts, types of care, formal versus informal and custodial care, nursing homes and assisted living, government programs, long-term care insurance, asset protection, deductibility, payouts and funding options.

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3234594669	8/8/2022	NAU Country Insurance Company	2023 WFRP and Perennial Training	Property & Casualty	General: 4	NAIC Uniform submission, 4 classroom credit hours approved by Minnesota. Discusses 2023 whole farm revenue protection, federal handbook and system changes, farm operation report, micro farm changes and provisions, perennial crops, actuarial changes, fruit crop programs and program highlights.
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3381785703	8/8/2022	New York Life Insurance Company - National	2022 Advisor Symposium	Life	General: 3 The course addresses product knowledge of life insurance. Discusses fiduciary responsibility, reviewing and maintaining existing policies, SECURE (Setting Every Community Up for Retirement Enhancement) Act regulations, required benefit distribution, inherited retirement account planning, Department of the Treasury claw back regulations, split dollar life insurance, and life insurance for estate objectives.
3503827171	8/8/2022	Nationwide Life Insurance Company	Special Considerations: Black Clients Financial Futures	Life	General: 1 The course addresses product knowledge of life insurance. Discusses redlining, historical concerns, market size, specific planning needs, and diverse market resources.

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3891593635	8/8/2022	DF Institute, dba Kaplan Financial	Ethical Insurance Producer, 2nd Edition	Ethics	Ethics: 3	The course addresses ethics. Discusses insurance producer responsibilities to the state, insurer and client, ethical sales presentations, policy replacement and illustrations and ethics in marketing.
4001805098	8/8/2022	Independent Insurance Agents' Association of Montana	Vital Endorsements in Personal Lines	Property & Casualty	General: 2	The course addresses property and casualty insurance. Discusses endorsements to homeowners and personal auto policies, exclusions and limitations in standard policies, types of endorsements and the provided coverage.
4001805098	8/8/2022	Independent Insurance Agents' Association of Montana	Training Our Personnel to Achieve Our Ethics Goals	Ethics	Ethics: 3	The course addresses ethics. Discusses ethical behavior, agency culture, enhancing ethics through training, leadership, and impediments to ethical behavior.

4275399109	8/8/2022	InsuranceStudy.com	Workers Compensation Insurance	Property & Casualty	General: 3	NAIC Uniform submission, 3 computer-based, self study credit hours approved by Illinois. Discusses the workers' compensation system and policy, employer's liability, duty following injury, premiums and endorsements, premium determination and current cost issues.
4275399109	8/8/2022	InsuranceStudy.com	The National Flood Insurance Program (NFIP)	Property & Casualty	General: 5	NAIC Uniform submission, 5 computer-based, self study credit hours approved by Illinois. Discusses the National Flood Insurance Program, private flood insurance and the write your own (WYO) program, modeling rate setting, claims and disputes.

4275399109	8/8/2022	InsuranceStudy.com	Individual Retirement Accounts Life	General: 5	NAIC Uniform submission, 5 computer-based, self study credit hours approved by Illinois. Discusses traditional pre-tax individual retirement accounts, limitations, tax considerations and distributions, Roth post tax retirement accounts, Coverdell education savings accounts, simplified employee pensions, and Savings Incentive Match Plan for Employees (SIMPLE) IRAs.
4275399109	8/8/2022	InsuranceStudy.com	Cyber Risks: Insurance	Property & Casualty 5	General: NAIC Uniform submission, 5 computer-based, self study credit hours approved by Illinois. Discusses cyber crime, cyber risk, insurance covers for cyber risk, data breach damages, cloud-related concerns, and future cyber risk.

4275399109	8/8/2022	InsuranceStudy.com	Long Term Care Fundamentals	Long Term Care	General: 4	NAIC Uniform submission, 4 computer-based, self study credit hours approved by Illinois. Discusses elements of long-term care, conditions requiring long-term care, care settings, costs and cost payees, long-term care insurance, benefits and coverage, optional and basic benefits, suitability, ethical issues, and long-term care insurance alternatives.
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Individual Course Submissions

8/3/2022	Tim Friez, Terry Scherr, Danielle Pedersen	Risk Rating 2.0, National Flood Insurance Program, Federal Emergency Management Agency	Property & Casualty	General: 3	The course addresses product knowledge of property and casualty insurance and management. Discussed upcoming changes in the National Flood Insurance Program premium pricing, variables that affect premium pricing, construction type, replacement cost value versus market value, claim examples, and transition from existing policies. The course was held July 21, 2022.
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8/4/2022	Daniel Shepherd	Accident Investigation and Evidence Handling, Rimkus Consulting Group	Property & Casualty	General: 1	The course addresses product knowledge of property and casualty insurance. Discussed evidence gathering, event data recorders, fraud in auto accident claims, witness statements and medical documentation and investigation the site. The course was held July 20, 2021.
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