

## Course Descriptions:

### **ACSR# 4 - E&O Risk Management Overview and Program Development. – 6 CE (E2)**

Can marketing and sales activities really pose errors and omissions threats? Judy Durst shows participants how certain phone, in-person and Web site interactions create E&O exposures. Learn how to avoid 21st century E&O claims with the latest in E&O loss control. This session outlines specific policies, procedures and practices gathered from E&O carriers, agency management consultants, state executives, education directors, and agency owners/principals.

Instructor: Judy Durst, CPIW, CIC, CPCU, AU, ARM  
Director of Education, IIABNH

CE states approved: NH, VT, NJ, NY, MA, PA, CT, ME, RI  
Cost: \$125 (includes breakfast, 2 breaks, & lunch)

### **Cyber Crime – The Hidden Exclusions: - 6 CE (E1)**

The rapid advance of technology has changed the way all business is carried out. Tasking, communications, electronic data interchange (EDI) of business information, manufacturing and engineering sciences have all become more efficient because of e-commerce. The paradigm shift brought on by the swift change in technology has outpaced the talent pool of workers, the judicial system and the insurance industry. This course explores the exposures of CyberCrime (CyberRisk), the gaps in conventional insurance products in an electronic environment and the solutions for managing the risks. 6 hours.

Instructor: Elise Farnham CPCU, ARM, AIM, CPIW  
*International Speaker and Industry Consultant*

CE states approved: VT, NH, NJ, NY, MA, PA, CT, ME  
CE approval pending: RI  
Cost: \$125 (includes breakfast, 2 breaks, & lunch)

### **Solving Workers Compensation: - 3 CE (E5)**

This workers comp class is an overview of the current workers compensation pitfalls. It explores coverages A, B & C, the electronic world of WC and statutory requirements. Annette first taught this class at Regional Conference in Harrisburg, PA and has kept up with all the changes in each state since that time.

Instructor: Annette Hannah, CPIW  
Vice President, Cardinal Comp, LLC

CE States approved: VT, NH, NJ, MA, PA, CT, ME, RI  
CE approval rejected: NY

### **Insurance Fraud 2010: -Part 1 – 3 CE (E6) (2 parts-each part with 3CE credits. Take both for a total of 6 hours)**

We will examine the current trends in insurance fraud, review leading indicators, and talk about what we are seeing on the front lines. Topics will include a review and discussion of the use of investigative tools, the Examination Under Oath, policy provisions and other options available to insurance professionals in their effort to stop and combat fraud and fraudulent claims. We will look at fraud during the pendency of the claim and application fraud. The course will include a panel discussion with a leading fraud investigator in New England as well as a SIU attorney. Class participation in the discussion is highly encouraged!

Instructors: Richard Lord & Terry Seger

CE states approved: VT, NH, ME, MA, CT, PA  
CE approval pending: NJ, RI, NY

### **Insurance Fraud 2010: -Part 2 - # CE (E13) (2 parts-each part with 3CE credits. Take both for a total of 6 hours)**

Instructors: Richard Lord & Terry Seger

CE states approved: VT, NH, ME  
CE approval pending: PA, NJ, CT, RI, MA, NY

**A Plethora of Personal Lines Issues**. – 3 CE (E4)

What is a plethora? It means superabundance! This class is chock full of personal lines information. We'll go over the pitfalls, perils and purposes of the Personal Articles Floater, Personal Umbrellas, Flood, insuring recreational vehicles and golf carts, condominium unit owner certificates and the differences between the 91 edition and the 2000 edition of the HO 3 form. This is the place to bring your questions!

Instructor: Judy Durst, CPIW, CIC, CPCU, AU, ARM  
Director of Education, IIABNH

CE States Approved: NH,  
CE States pending approval: VT, ME, PA, NJ, CT, RI, MA, NY

**Leadership Development: (E8)**

This workshop is designed to examine the art of leadership and suggest ways the student can develop or enhance leadership skills. Participants first review current business theory regarding leadership styles and characteristics. Then, using the Personal Strengths Assessment Audit, the participant learns about their strengths and weaknesses in twelve key areas. Other sessions include the following topics: communication, developing financial awareness, team building, decision-making, mentoring and leading change. CPIW/M and DAE qualifier.

Instructors (**Past Regional Officers**): Joanna Mahoney (Past Nat'l President) Linda Wilson (Current Int'l President), Elena Ifkovits, Gina Desmarais, Jill Gidge, Susan Musolff

CE: No CE's for this program but lots of experience!  
Cost of NAIW Student Manual - \$22.00

**Making a Difference-Ethics & the Insurance Professional--1-Hour Ethics: (E9)**

**THIS IS THE CORRECT & ONLY ETHICS COURSE THAT QUALIFIES FOR THE DAE DESIGNATION.**

This course was written for NAIW by Past National President Elise Farnham to help fulfill the new 1 HOUR Ethics requirement for the DAE designation.

Instructor: Elise Farnham CPCU, ARM, AIM, CPIW  
*International Speaker and Industry Consultant*

CE: No CE's for this program  
Cost: NAIW Student Guide - \$15.00

**"Understand How You Impact the Bottom Line": (E3)**

This class is designed to give CSR's an overview of Accounting and help them understand how their work impacts the bottom line. There will be a PowerPoint presentation which will include sample financials and outline the accounts that are affected by their work. A plethora of items will be covered including accrual vs. cash accounting, trust and operating funds, company payables, financed premiums, installment invoicing, "garbage in = garbage out", budgeting and goals. This class is not designed for Accountants; the objective is to help CSR's understand the big picture and the important role that they play in it.

Instructor: MaryAnn Dion

CE: No CE for this program

**Shoulder Surfing & Dumpster Diving: (Identity theft) – 3 CE (E7)**

The class defines confidentiality, privacy, breach of privacy & identity theft; how identity theft and breach of privacy may occur, what coverage is, or is not available in traditional ISO coverage forms. We'll talk about ways to help manage risks of identity theft and breach of privacy and describe what protection is afforded under current laws.

Instructor: Jill Gidge, CPCU, CIC, CISR, CRIS, AAI, ACSR, AAM, AIT, CPIW, AIS, BSN, RNC  
*President at Insure-Ed*

CE States Approved: VT, NH, NJ, CT, RI  
CE States pending approval: ME, MA, PA, NY

### **Outlook 101: (E10)**

Life is crazy...there are places you need to be, important events that need remembering, and your email is out of control. This class is designed to provide you with a few tips on how to control the daily events of every day life via the use of Outlook.

Instructor: - *pending*

CE: No CE for this program

### **Ethics and the Insurance Professional: Building Strength – 3 CE (E14)**

We are often faced with ethical decisions in the heat of the moment and must make an immediate response. Just like an athlete training for a marathon, we must be fit and ready to make the right decisions when the situation arises. In this seminar, attendees will analyze their personal core values and how those values are shared – globally. We will explore why ethics are important in our lives and how we apply them in day to day situations. We will analyze right vs. right paradigms and evaluate our personal preference when choosing between them. And, learn how to find our moral courage to stand up for what is right. This is an interactive seminar utilizing case studies and exercises. After completing this seminar, the attendees will:

- Have a better understanding of the meaning and importance of ethics in our profession
- Review right vs. right situations and how to resolve them
- Understand how to develop and use moral courage to make the right decisions and stand by them.

Instructor: Elise Farnham CPCU, ARM, AIM, CPIW  
*International Speaker and Industry Consultant*

CE states approved:

CE states pending approval: NH, VT, CT, RI, MA, NY, PA, ME, NJ

### **“My Client had a loss-Now What?” – 2 CE (E11)**

This class is designed to provide some additional knowledge to customer service representatives regarding questions that should be asked when a client calls in with a claim. The course will provide basic information on different types of claims and what information is important for each type as well as provide a checklist designed to be used as a tool by the CSR. The course will be helpful information for services representatives and claims personnel who possess limited claim knowledge and experience.

Instructor: Cecil Foster, WRT, ASD, AMRT

CE states approved: VT, PA, NH

CE states pending approval: ME, CT, RI, MA, NY, NJ

### **Understanding Life Insurance (E12)**

The title speaks for itself, but I will be covering the needs for life insurance, and I will give a clear explanation of the different types of life insurance. Life insurance is something that if more people understood it, they wouldn't fear it! There will be plenty of time for questions and answers.

Instructor: Patti Gagne

CE: No CE for this program

### **“One Body, One Life, Define It” (E15)**

Many of the programs being offered at this conference are designed to help you in your everyday work life. This program is just about *YOU*. With all the stresses of everyday life, we spend a great deal of our time running around and taking care of others often neglecting ourselves. We all have only one body and one life. During this program our speaker combines fitness and health education with an enthusiastic and motivating message that will help you define that one body and life. Gina is a Registered Nurse with a B.S in Health Care Studies and has been a nationally certified Group Fitness Instructor with A.F.A.A. for over 20 years. She is joining our conference and is sure to INSPIRE and MOTIVATE each of us.

Instructor: Gina E. McGuire, RN, BS – Motivational Speaker/Presenter

CE: No CE for this program