

COVER PAGE

Name of Provider: Building Competent Insurance Agents Association

Comment [JJ1]: Enter name of Business

Name of Course: Communicating Insurance to Consumers for Comprehension

Comment [JJ2]: Enter the title of the course

Targeted audience: General lines agents that are new in the business

Comment [JJ3]: Who are you presenting to?
Examples: life agents, general lines agents, adjusters.
Beginners or more experienced?

Course Objective: To teach insurance agents how to communicate the terms of insurance contracts to their customers for comprehension.

Comment [JJ4]: At the end of the course, what new knowledge and/or skill will your participants be leaving with?

Course Relevance: Many consumers express that they do not understand the type of coverage that was sold to them. They aren't clear of the provisions of their policy. This makes it difficult for them when it comes time to making a claim. Since most consumers rely on their agent to bridge the knowledge gap it is important that Insurance agent know how to explain various contractual allowances to their clients.

Comment [JJ5]: Summarize how your course material is relevant to the line of work of your target audience. How does it increase the professionalism, ethics, and competence needed to perform their primary responsibilities to the public.

Study Method: Seminar

Comment [JJ6]: Will this be a seminar full or seminar partial?

Name(s) of guest lecturer(s): Jim Smith, CPCU

Comment [JJ7]: Include names of any guest speakers. If the course will only be taught by approved instructors, then input N/A

Name of School Official or approved instructor in attendance: William Jackson

Comment [JJ8]: Name at least one approved instructor who will be presenting or facilitating. If no approved instructors will facilitate or teach, enter the name of the school official who will be present

Outline

I. Introduction **5 Min**

Discussion on unauthorized entities

II. Main Point 1 **10 Min**

- a. Sub Point 1
 - i. Relevant cases or examples – when applicable
 - ii. Relevant cases or examples – when applicable
- b. Sub Point 2
- c. Sub Point 3

III. Main Point 2 **10 Min**

- a. Sub Point 1
 - i. Relevant cases or examples – when applicable
 - ii. Relevant cases or examples – when applicable
- b. Sub Point 2
- c. Sub Point 3

IV. Main Point 3 **10 Min**

- a. Sub Point 1
 - i. Relevant cases or examples – when applicable
 - ii. Relevant cases or examples – when applicable
- b. Sub Point 2
- c. Sub Point 3

V. Main point 4 **15 Min**

- a. Sub Point 1
 - i. Relevant cases or examples – when applicable
 - ii. Relevant cases or examples – when applicable
- b. Sub Point 2
- c. Sub Point 3

Break **10 min**

Total Instruction Time **50 min**

Total Break Time **10min**

Comment [JJ9]: One page of outline material for each hour of study.

Comment [JJ10]: Include time. Time blocks should be no longer than 50 minutes.

Comment [JJ11]: Not required for courses that are exclusively for Adjusters, Title Agents, or Bail Bond agents. See full verbiage below.

Comment [JJ12]: Describe the case studies and examples you will be using.

Comment [JJ13]: Include a 10 minute break for each hour of time.

Total Time

60 min

Comment [JJ14]: Summarize total time. 50 minutes of instruction and 10 minutes of break equals one hour of CE.

Unauthorized Entities Updated Verbiage:

An entity that is required to be licensed or registered with the Florida Office of Insurance Regulation but is operating without the proper authorization is identified as an ***unauthorized insurer***. All persons have the responsibility of conducting reasonable research to ensure they are not writing policies or placing business with an unauthorized insurer. Any person who, directly or indirectly, aid or represent an unauthorized insurer can lose their licenses or face other disciplinary sanctions. Please see section 626.901, Florida Statutes, to read the laws. Lack of careful screening can result in significant financial loss to Florida consumers due to unpaid claims and/or theft of premiums. Under Florida law, a person can be charged with a third-degree felony and also held liable for any unpaid claims and refund of premiums when representing an unauthorized insurer. It is the person's responsibility to give fair and accurate information regarding the companies they represent.

Comment [JJ15]: Include full verbiage text to be handed to all participants

Speaker Biography

Comment [JJ16]: Include the biography of any guest speaker

Name of Speaker: Jim Smith, CPCU

Biography: Jim Smith has been in the property and casualty insurance business for 38 years. He has spent the last 11 of those years as the general agent for the You're Covered insurance agency. Jim's agency has a staff of 6 general lines agents and 4 customer representatives. They have been providing all lines of property and casualty insurance to citizens in the Leon, Madison, Jefferson, and Gadsden county area for 23 years. For the past 6 years, Jim has been delivering presentations to numerous groups of insurance agents to help increase the professionalism, competence, and ethics in their practices. Jim speaks on topics ranging from putting the consumer needs ahead your own to understanding the underlying trends in property and casualty coverage.

AGENDA IS REQUIRED FOR SEMINAR PARTIAL COURSES

Agenda for a 2 day Seminar (Sample)

Providers Name

March 6 and 7, 2012 (Date of Seminar-Full)

Day, Date and location (Tuesday, March 6, 2012, Larson Building room 412)

Day 1:

8:30 – 9:00 a.m. Welcome and Introductions by

9:00 – 10:30 a.m. SESSION(S)

10:30 – 10:45 a.m. Break

10:45 – 12:15 a.m. SESSION(S)

12:15 – 1:30 p.m. Lunch

1:30 – 3:00 p.m. SESSIONS(S)

3:00 – 3:15 p.m. Break

3:15 – 5:00 p.m. SESSION(S)

Adjourn for the day

5:00 – 7:00 p.m. RECEPTION (*optional*)

Day, Date and location (Wednesday, March 7, 2012, Larson Building room 412)

Day 2:

8:30 – 8:45 a.m. Introductory Comments

8:45 – 10:30 a.m. SESSION(S)

10:30 – 10:45 a.m. Break

10:45 – 12:15 p.m. SESSION(S)

12:15 – 1:30 p.m. Lunch

1:30 – 3:00 p.m. SESSION(S)

3:00 – 3:15 p.m. Break

3:15 – 4:45 p.m. SESSION(S)

4:45- 5:00 Wrap Up Close Out

Adjourn

Comment [JJ17]: Include title of sessions- also indicate when sessions are concurrent.