

Bricker Professional Education Course Library

Practitioner Series

Course Title	Course#	Training Objective	Credit Hours	Course Format	Credit Eligibility
Industry rEvolutions: <i>Modernization, Demutualization and Reinsurance</i>	1002925	The objective of <i>Industry rEvolutions: Modernization, Demutualization and Reinsurance</i> is to familiarize the student with the significant changes occurring in the regulation and organizations in the insurance industry. In particular, the impact of the deregulation of the financial services industry under the Financial Modernization Act of 1999 on insurance producers and insurers is explored. Additionally, the significant reduction in mutual insurers and the expansion of the reinsurance marketplace is surveyed to discover the impact these seemingly distant events have in the local insurance market.	4	Classroom	L,AH,PC, PACE
Insuring Your Future: <i>Agency Management and the E&O Policy</i>	1002920	The objective of <i>Insuring Your Future: Agency Management and the Errors & Omissions Policy</i> is to provide the student with the tools necessary to reduce the likelihood of professional negligence and errors and omissions claims. The first segment of the course familiarizes the student with significant trends in E&O claims, litigation, policy availability, and costs. Next, the most common professional negligence claims are reviewed with best practice recommendations to provide the student with the management tools necessary in providing exemplary service to policyholders while preventing potential E&O claims. Finally, the characteristics of the E&O claims-made policy form are analyzed to ensure the student has the ability to determine the suitability of current coverage and provisions.	4	Classroom	L,AH,PC, PACE

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Technology rEvolutions: <i>Communication, Underwriting and Customer Service</i>	1002919	The objective of <i>Technology rEvolutions: Communication, Underwriting and Customer Service</i> is to encourage an in-depth discussion with students regarding the massive impact technology is having in client communications, underwriting, and customer service. The importance of utilizing every tool available to provide high quality service to each policyholder is emphasized throughout the course. Social trends are surveyed for the purpose of exploring the characteristics of the insurance consumer of the future. Additionally, the students are exposed to potential future implications in underwriting based upon the completed work of the Human Genome Project and other DNA-based scientific advances. Finally, the wide array of technological tools and their uses are brought together to enhance the education of policyholders and improve the suitability of initial and ongoing professional insurance recommendations.	4	Classroom	L,AH,PC, PACE

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Chickens, Terrorists and Natural Disasters: <i>Managing Risk in a Dangerous World</i>	1006019	The objective of <i>Chickens, Terrorists and Natural Disasters: Managing Risk in a Dangerous World</i> is to survey the landscape of insured catastrophic exposures facing the private and residual insurance industry. Beginning with a discussion of the fundamental concepts of catastrophic risk management, this course describes in three separate lessons the characteristics of the following catastrophic exposures: H5N1 Avian Flu pandemic, International Terrorism, and Natural Disasters (with an emphasis on hurricanes, earthquakes and floods). Furthermore, each lesson includes the projected financial impact on reserves and overall claims paying ability of those life, health, property and casualty insurers with significant exposures to these risks. Students are encouraged to participate through group discussion segments included in each lesson.	4	Classroom	L,AH, PC, PACE

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Deregulation, Meltdown and Bailouts: <i>Reassuring Clients in a Financial Storm</i>	1006122	The objective of <i>Deregulation, Meltdown and Bailouts: Reassuring Clients in a Financial Storm</i> is to provide insurance professionals with the requisite information to effectively and accurately communicate to their clients the nature of the 2007-2008 economic crises. An ancillary goal of this course is to reinforce to both the insurance professional and consumer a confidence in our financial system and insurance industry. To counter the often incorrect or misleading information delivered by the financial news media, this course begins with the history of financial crisis and banking system failures. Next, the current economic environment is explored with an emphasis on the direct role played by segments of the insurance industry preceding the near collapse of the U.S. financial system. In particular, the actions of both municipal bond insurers and AIG are surveyed. Finally, the impact and likely future costs to the insurance industry both in revenue and insurer valuation are considered.	4	Classroom	L,AH,PC, PACE

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Managing Tomorrow: <i>Genomes, Millennials, and the Virtual Agency</i>	1006126	The objective of <i>Managing Tomorrow: Genomes, Millennials and the Virtual Agency</i> is to explore through instruction and group discussion the significant impact of cultural and technological change on key aspects of agency management. Although relatively static for several decades, the agency model is rapidly evolving. To continue the relevance and perpetuation of the local insurance agency, this course encourages the insurance professional to rethink the concept of the personal service firm. Beginning with field underwriting, the fundamental function of an insurance agency, and continuing through topics such as staffing, service functions, and communication, the student will learn to adapt new technologies and management processes to the historic insurance agency framework.	4	Classroom	L,AH,PC, PACE

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Technology and the Future of Financial Service: <i>The Local Agency Model in an eWorld</i>	1006200	The objective of <i>Technology and the Future of Financial Service: The Local Agency Model in an eWorld</i> is to explore significant impact of cultural and technological change on key aspects of agency management. Although relatively static for several decades, the agency model is rapidly evolving. To continue the relevance and perpetuation of the local insurance agency, this course encourages the insurance professional to rethink the concept of the personal service firm. This course begins with a survey of the changing landscape of insurance including underwriting, distribution, and product development. Next, the rapid expansion in the use of technological tools, especially those designed for communication between firm and client, are discussed. Finally, the preceding topics are synthesized into a new model for the local financial services firm: The Virtual Agency. This model is described with an emphasis on effective client communication, education, and customer service.	2	Classroom	L,AH,PC, PACE