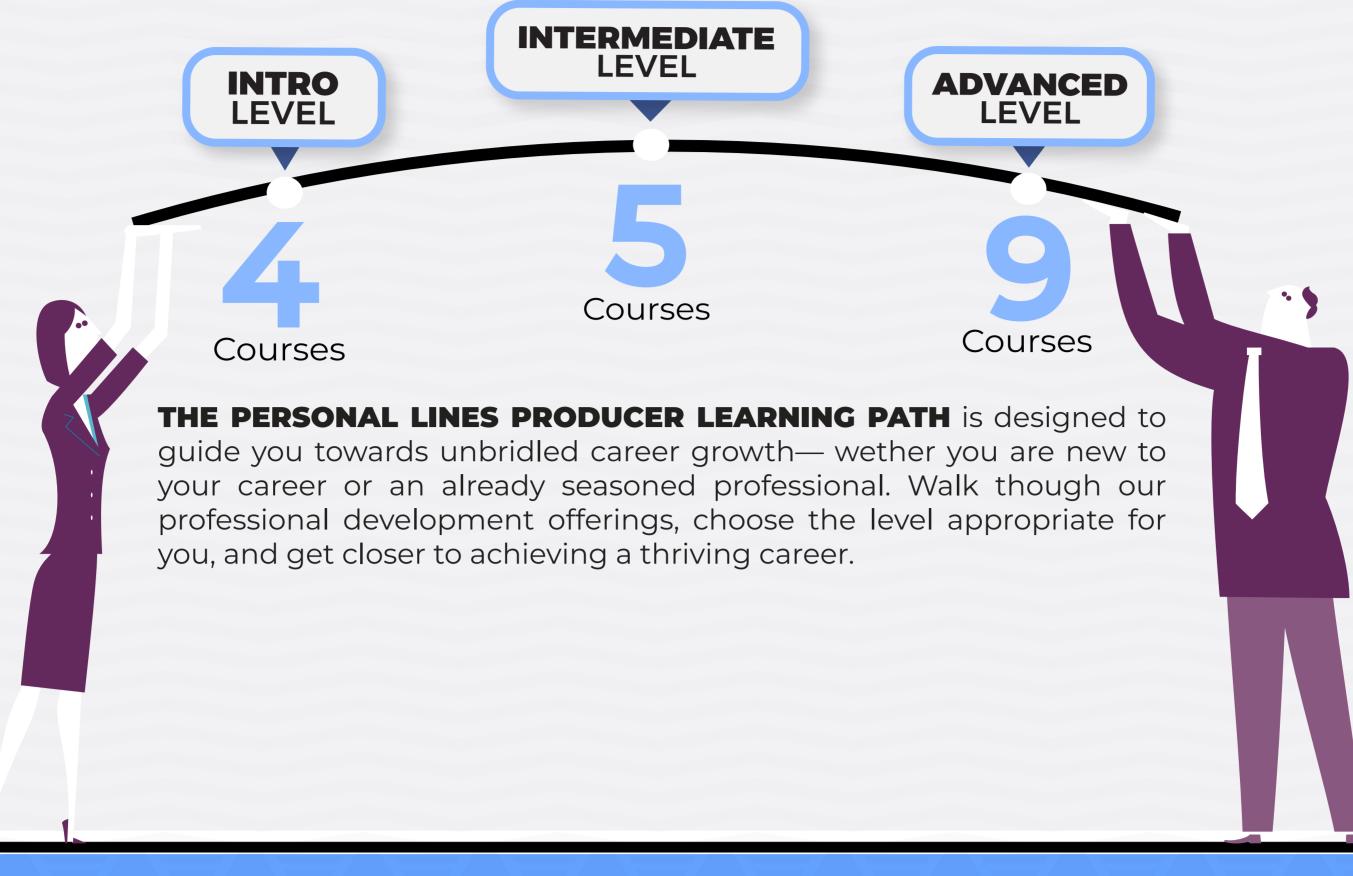
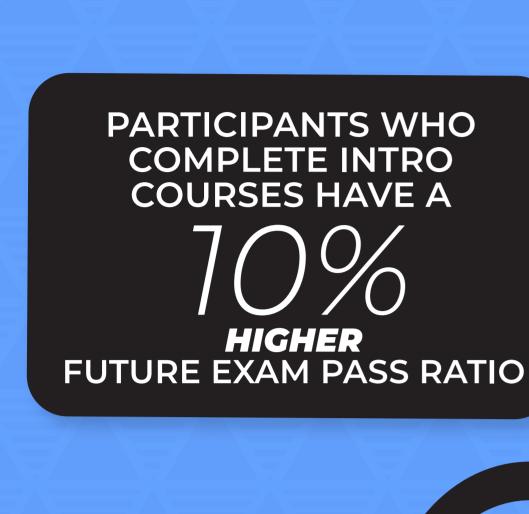


## PERSONAL LINES **PRODUCER** PERSONAL LINES PRODUCERS work in the field or at the office,

marketing, soliciting, developing, and servicing personal lines insurance accounts. The Producer contacts prospective clients and explains features and benefits of policies offered. They recommend amount and type of coverage based on analysis of the prospect's circumstances. They increase retention by cross selling, account rounding and upgrading coverage on existing accounts, and nurturing special client relationships. **INTERMEDIATE** 





## INTRO LEVEL

CASUALTY INSURANCE Foundational insurance concepts, principles, and liability basics with a focus on property and casualty.

INTRO TO PROPERTY &



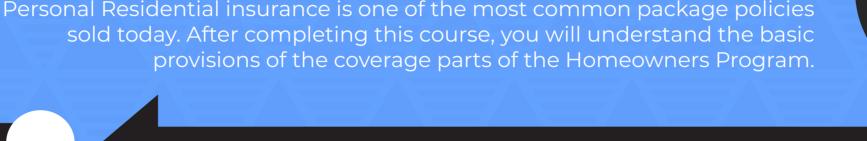


course is about how it actually works. After completing this course you will understand the basic provisions of the coverage parts of the Personal Automobile Policy.

INTRO TO PERSONAL AUTO INSURANCE

INTRO TO PERSONAL RESIDENTIAL PROPERTY

Personal Automobile insurance is a familiar coverage for anyone who owns a car. This



INTRO TO LIFE AND HEALTH INSURANCE See what life and health is all about. Review the important coverages and financial





strategies used across the industry for life and health insurance.

INTERMEDIATE

**LEVEL** 





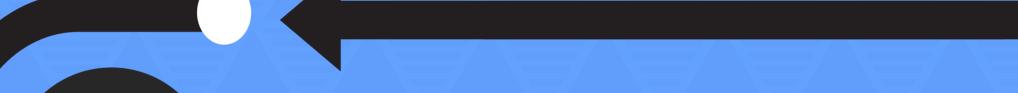
most valuable assets and their financial future in the event of a loss.





importantly, you will be able to provide practical information that will help clients make decisions for protecting their most valuable assets and their financial future in the event of a loss.

The CISR Personal Residential Course helps you develop the expertise to guide your customers through the often complex and confusing process of purchasing homeowners insurance. More



**AGENCY OPERATIONS** 

within insurance organizations.

created by clients' business activities and their ownership or use of recreational vehicles and watercraft.





LIFE & HEALTH ESSENTIALS This course helps build a better understanding of what your clients need to know about life and health insurance. Explaining the benefits of having the proper life and health insurance is key to the financial wellbeing of your clients' families and businesses.

**EARNED** THE CISR

**DESIGNATION** 

agency or give you confidence to move into another position. As you work with colleagues and customers, you'll discover an enhanced self-assurance and a greater understanding of the dynamics



**COURSE WILL IMPROVE** THEIR JOB PERFORMANCE industry, covering topics related to Personal Residential and Personal Auto, including policy coverages, limitations, and exclusions. Through the use of examples of Personal Umbrella or Excess Policies, you will learn how to respond in the event of a loss.

**OF PARTICIPANTS WHO COMPLETE CIC & CPRM COURSES SAID THAT THE** 

**PERSONAL LINES** In the CIC Personal Lines course, you will focus on the Property Casualty insurance

ADVANCED

LEVEL





claims, and other vital company functions.









net worth clients and the importance of incorporating risk management when structuring their insurance programs.

Learn the steps of the risk management process for affluent and high

**EVALUATING AND** PROTECTING THE LIFESTYLE Thoroughly protecting the lifestyle of the affluent and high net worth client by insurance and risk management is the focus of this course. Learn to evaluate the often specialized coverage needs and gather the necessary information used by insurance companies to insure and risk manage these lifestyle exposures.



designed specifically for these clients.

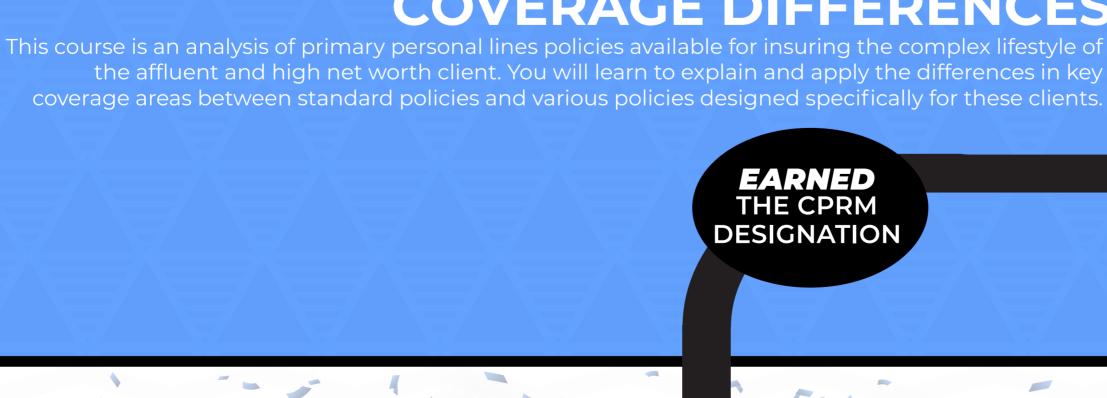
WINNING THE BUSINESS

This workshop-style, hands-on session helps you to understand both the broker side and the company side of serving these clients. Successful role play is a part of the course and is a great way to polish your skills and test your knowledge.

> **EARNED** THE CPRM

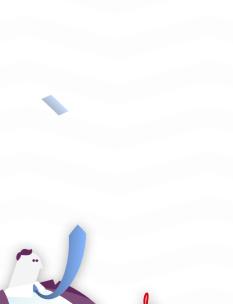
**DESIGNATION** 





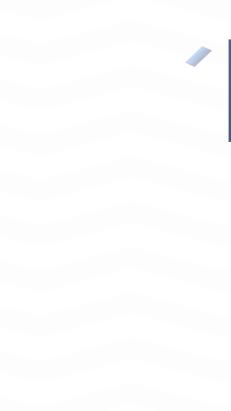






CPRM

DIPLOMA & PIN



CERTIFICATES

**BEFORE LEARNING PATH** 

LEARNING PATH

\$86K

**ANNUAL COMPENSATION** 

\$113K **BOOK OF BUSINESS SIZE** 

**PROFocus** 

**COMPREHENSIVE LEARNING WILLIAM T. HOLD** 

> 40+ ESSENTIAL. SPECIALTY, AND ADVANCED TOPICS

**DYNAMICS** 

OF SELLING **INDUSTRY SPECIFIC SALES** TRAINING COURSES

series **HIGH-LEVEL INSURANCE AND RISK EDUCATION TOPICS** 

intro series 4 INTRO SERIES CISR DESIGNATION

**DIPLOMA & PIN** 







**SEMINARS** 

\*All evaluation numbers are based on total evaluations received from participants during 1/1/2019 – 10/14/2019 \*All Compensation And Production numbers are based on 2016 Edition of the Producer Profile