

PIA Montana Producer Seminar

The 4th annual PIA Montana Producer Seminar will be held in Bozeman at the Holiday Inn on:

October 3 and 4, 2013



October is rapidly approaching and we're a month away from the annual PIA Montana Producer Seminar. It's two days of excellent education, networking opportunities for agents and company representatives and gives agents a chance to check out new products and services from PIA supporting companies.

And PIA Montana Producer Seminars are FUN!

Click [here](#) to register now

Click [here](#) to download a brochure on this year's Producer Seminar

Education

Cyber 101: Cyber Liability Risks & Insurance Basics: Valid for 3 CE Hours in Montana

Attendees will gain a basic understanding of the causes of data security breaches, what actions may be required to take, the various state and federal laws that will be triggered in the event of a breach, procedures that should be undertaken prior to a breach, what the costs associated may be and how traditional insurance may or may not respond.

Learn basic risk management techniques to protect data of what Cyber Liability policies will and will not cover.

Agents will be motivated agents to speak with their current or prospective insured's about the exposures they face in the collection, transmission, storage and destruction of confidential data and how to transfer this risk to the proper insurance policy based upon their needs.

Instructor: Ed McGuire is the Senior Broker for the newly formed Boston, MA branch of U.S. Risk Brokers, Inc. Ed's expertise comes from over 40 years of experience in the insurance industry as a Wholesale Broker of Commercial, Property and Casualty Insurance.

Commercial Property Coverage Gaps and Endorsements: Valid for 2 CE Hours in Montana

This session will explore the latest in ISO building and commercial policy coverage gaps and examine endorsements to address limitations and including property not covered



adequately, valuation issues, debris removal, ordinance or law, flood exposures and e-commerce concerns from actual case studies.

The Introduction to the Body Language of Sales

This is an informative and interactive introductory session about the **Body Language of Sales**. What does your body language really say about you? Is it consistent with the message you are giving to a potential client? Can you tell from a client's body language if the sales call is going well? Are they interested in what you have to say? Will they respond with a "yes", "no", or "tell me more?"

Instructor: Both classes instructed by Miles Dan'l Adams who has 23 years of experience in the insurance industry including sales, marketing, and claims. Dan'l is the Training Manager for Liberty Mutual.

The Latest in E&O and What Can Be Done About It: Valid for 3 CE Hours in Montana

Every year, the E&O landscape seems to take a new twist or two. This 3-hour loss control seminar takes a look back in time and reviews what has changed over the years. Included will be extensive discussion on the major E&O issues that agents face and the new plaintiff's that are bringing litigation against today's agent. A series of best practices will be provided to help agents face these various challenges. Throughout the session, actual E&O cases will be used to enhance the understanding of the material.

Curtis Pearsall is President of Pearsall Associates Inc., a Risk Management Consulting firm specializing in helping agents protect themselves. He is the former SVP of Utica National's Agents E&O program where he oversaw their Underwriting, Marketing Services and Claims divisions from 1987 to 2009.

CPIA Designation: The CPIA designation — Certified Professional Insurance Agent — continues at this year's Producer Seminar with CPIA 3 — Sustain Success course.



CPIA Designation

Those who attended CPIA 1 and CPIA 2 at the 2012 Producer Seminar can continue to complete their designation and those who would like to start working on the designation can do so by attending this year. **Please note: the designation does not require you to attend the 3 CPIA seminars in any particular order so you can start the designation process with course 3.**

To earn the CPIA designation, candidates are required to participate in three Insurance Success Seminars. Each seminar takes a full day to complete.

CPIA is a first of its kind, hands-on, how-to training designed to enhance the ability of producers, sales support staff, company personnel, sales and account managers to efficiently create and distribute effective insurance programs.

CPIA 3 — SUSTAIN SUCCESS session focuses on fulfilling the implied promises contained in the insuring agreement. Students will review methods of providing evidence of insurance coverage; will discuss policies and procedures for controlling errors and omissions including policy review and delivery, endorsements, claims-processing, and handling of client complaints. This course includes a review of Professional Expectations, the Law of Agency, and Legal and Ethical Standards.

The other two courses are:

- **CPIA – 1 Position for Success:** it focuses on internal and external factors affecting the development of effective business development plans.
- **CPIA – 2 Implement for Success:** it provides specific tools for analyzing consumer needs.

The CPIA designation is overseen by the AIMS Society. PIA Montana is the only designated provider of the CPIA Designation in the nine Western states served by the PIA Western Alliance.

The instructor for the CPIA course is former PIA National President Terry Adams. He is one of few instructors approved to teach CPIA in the United States. A longtime member of PIA, Terry has owned an insurance agency and currently owns and operates the consultant firm, Terry Adams and Associates.

Terry has taught Health, Safety and Risk Management at Southern Oregon University and also instructs on a variety of Continuing Education topics, including the CPIA — Certified Professional Insurance Agent. He is also a board member of PIA Oregon/Idaho, the PIA Pacific NW Services Corporation and the PIA Western Alliance.

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Click [here](#) to download a brochure on this year's **Producer Seminar
New Products & Services**

Meet company representatives who want to meet you, learn about your business and share the latest of their products and services.

Network with Other Agents, Company Representatives & PIA Staff

The PIA Montana Producer Seminar always provides plenty of networking time. In fact, it's the #1 item those attending check in our post event surveys!

All Things PIA Mean Fun!

Our annual Texas Hold 'Em Poker Tournament is always a hit. Have a little fun and win great prizes! Even if you don't know how to play, don't be shy. Last year's winner had never played before! It's all in good fun for a good cause. Proceeds from the Texas Hold 'Em Poker Tournament go to the PIA Western Alliance Community Foundation.

ALSO join us Saturday October 5 for some tailgating and football. Watch the MSU Bobcats take on Northern Arizona at Bobcat Stadium for some gridiron fun. And — as noted earlier — the first 20 FULL Package registrations paid by August 31st include a tailgate and one game ticket for Saturday's October 4th game between MSU and Northern Arizona.

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