

## Daily Class Discussion Topics

8:00 a.m. - 5:00 p.m.

### Registration

**\$216 per day/\$530 all three days in May**

Registration fee includes instruction text books and lunch. Overnight accommodations and meals outside the class are the attendee's responsibility. The fee must be paid in advance to guarantee attendance.

### Cancellation policy

Cancellations received within 7 days of the institute date will receive a full refund of registration fees. Cancellations the day of the program and no-shows will not receive a refund or be allowed to transfer registration fees to another date. You may transfer registration fees to another class up to the day before the class is held. Substitutions are honored at any time without penalty.

### Attendance Requirements

The American Insurance Marketing and Sales Society (AIMS) require your attendance during the entire course to be eligible to receive the CPIA designation. Tardiness and/or absence will result in the student not receiving the designation. Any missed time will have to be made up at another date.

### CPIA 1 - Position for Success

*Know Yourself & the Organization You Represent*  
*Know Your Industry*  
*Know Your Partners and What They Do Well*  
*Know Your Resources*  
*Identify Your Markets*  
*Identify Underwriting Concerns*  
*Deliver Your Message*  
*Take Action - Use What You Learned*

### CPIA 2 - Implement for Success

*The Role of the Agent*  
*Understanding the Prospect*  
*Effective Risk Analysis*  
*Think Underwriting - Prepare the Submission*  
*Delivering the Solution*

### CPIA 3 - Sustain Success

*Deliver the Product*  
*Provide Superior Service*  
*Maintain and Enhance the Relationship*  
*Account Development - The Pro-Active Approach*  
*Improve Professionalism*

### Course Dates and Locations

May 1 - CPIA 1 - Birmingham  
May 2 - CPIA 2 - Birmingham  
May 3 - CPIA 3 - Birmingham  
June 19 - CPIA 2 - Mobile  
August 30 - CPIA 3 - Montgomery  
October 18 - CPIA 1 - Birmingham



## 2012 Certified Professional Insurance Agent Schedule



### **Alabama Independent Insurance Agents**

141 London Parkway  
Birmingham, Alabama 35211  
(205) 326-4129 \* Fax (205) 326-3086

**www.aiia.org**

## Certified Professional Insurance Agent



The AIMS Society's Certified Professional Insurance Agent (CPIA) Designation is first-of-its kind, hands-on, how-to training. To earn the

CPIA designation, candidates are required to participate in three, one-day Insurance Success Seminars. These Seminars are designed to enhance the ability of producers, sales support staff and company personnel to efficiently create and distribute effective insurance programs. Participants leave with ideas that will produce sales results immediately. In fact, The Insurance Success Seminars are guaranteed: Implement the principles covered in these sessions and experience a 20% increase in personal production within six months, or your registration fee will be refunded! There are NO EXAMINATIONS required to earn the designation. The designation does require a continuing education update every other year.

### The three Insurance Success Seminars are:

#### CPIA 1 - Position for Success,

#### 7 CE credits including 1 hour ethics

During this program, participants are encouraged to focus on internal and external factors affecting the development of effective business development plans. Factors discussed include a review of the state of the insurance marketplace; analysis of competitive pressures; necessary insurance carrier underwriting criteria; and consumer expectations and understanding. Throughout each section of the workshop material, tips for preventing Errors & Omissions are highlighted and discussed.

## CPIA 2 - Implement for Success

### 7 CE credits

During this session, participants will be provided with specific tools for analyzing consumer needs; will learn to utilize risk identification techniques to gather pertinent prospect information; will develop skills necessary to assimilate information gathered into a customized protection program; and will participate in exercises designed to promote effective delivery of proven solutions. Throughout each section of the workshop material, tips for preventing Errors & Omissions are highlighted and discussed.

## CPIA 3 - Sustain Success,

### 8 CE credits including 1 hour ethics

This program 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. Throughout each section of the workshop material, tips for preventing Errors & Omissions are highlighted and discussed.

## Course Locations

**Birmingham-AIA Office**-(205) 326-4129

141 London Parkway

**Mobile - Hampton Inn & Suites** (251)

776-5866, 525 Providence Park Drive

**Montgomery-AUM** (334) 244-3641

7430 East Drive

## 2012 CPIA Registration

One person per form - duplicate if necessary.  
Course Time: 8:00 a.m. - 5:00 p.m.

Class Attending \_\_\_\_\_ City \_\_\_\_\_ Date \_\_\_\_\_

Name (Type or Print) \_\_\_\_\_

Agency/Company Name \_\_\_\_\_

Your E-Mail Address \_\_\_\_\_

City/State/Zip \_\_\_\_\_

Phone Number \_\_\_\_\_ Fax Number \_\_\_\_\_

Are you a member of AIAA \_\_\_\_\_ Yes \_\_\_\_\_ No

**Class Fee: \$216 per day (includes lunch)**  
**\$530 for all three days in May (save \$118)**

Payment enclosed/Charged: \$ \_\_\_\_\_

Paid Circle One) CHECK VISA MasterCard AMEX

Credit Card Number \_\_\_\_\_ Expiration Date \_\_\_\_\_

Name as it appears on card (PRINT) \_\_\_\_\_

Authorized Signature \_\_\_\_\_

**Make checks payable and mail to:**  
**Alabama Independent Insurance Agents**  
**141 London Parkway**  
**Birmingham, Alabama 35211**  
**(205) 326-4129 • Fax (205) 326-3086**  
**www.aiia.com**