

E&O RISK MANAGEMENT: MEETING THE CHALLENGE OF CHANGE

Complete List of Modules and Suggested Timeframes

This seminar was created using a modular approach allowing state associations the flexibility to create their own seminar by selecting the modules that most effectively address the E&O claims exposures of their audience. In time, more modules will be introduced expanding the content available for state associations to customize for their seminars. Below are the current modules available along with the anticipated time to teach each module. In total there is an estimated eight (8) hours of material available. Your instructors may choose to spend more or less time teaching each module. Classroom breaks are not included in the anticipated timeframes.

Swiss Re Corporate Solutions requires that the seminar be at least 6 hours in length for attendees to be eligible to receive the 10% loss control credit. In addition, they have designated five (5) modules as required learning in order for attendees to get the credit. Those modules are denoted with a check mark (“√”) below. We also have color coded the modules that may fit well being taught together to assist in the creation of your seminar. This may prove helpful for those state associations that would prefer to produce seminars in smaller sessions. Finally, Swiss Re Corporate Solutions would like state associations to begin using the new seminar materials by January of 2013, if possible.

Choose Module (Check)	Name of Module	Suggested Time (Minutes)	Your Anticipated Timeframe (Minutes)
✓	Agency/Carrier Relationships – Law of Agency	35 minutes	35
<input type="checkbox"/>	Agency/Carrier Contracts – E&O Considerations	35 minutes	_____
<input type="checkbox"/>	Compliance with State and Federal Laws	20 minutes	_____
✓	Understanding Agent Duties	25 minutes	25
✓	An E&O Claim - 360° View	85 minutes	85

<input type="checkbox"/>	Reporting an E&O Claim	15 minutes	_____
<input type="checkbox"/>	The Role of Agency Procedures	15 minutes	_____
<input checked="" type="checkbox"/>	Agency Defenses - Documentation	60 minutes	60
<input type="checkbox"/>	Risk Assessment Questionnaires and Coverage Checklists	20 minutes	_____
<input checked="" type="checkbox"/>	E&O Considerations of Agency Operations	60 minutes	60
<input type="checkbox"/>	E&O Issues of Certificates of Insurance	40 minutes	_____
<input type="checkbox"/>	Minimizing E&O Exposure from Excess and Surplus Lines	20 minutes	_____
<input type="checkbox"/>	Limiting Exposure to Data Breaches	25 minutes	_____
<input type="checkbox"/>	E&O Exposures When Using Social Media	25 minutes	_____
	Total Time:	480 minutes	_____