

The Society of Certified Insurance Service Representatives

Agency Operations

St. Petersburg, FL • January 14, 2020

Tuesday, January 14, 2020

7:30 AM - 8:00 AM		Registration with Coffee and Rolls
8:00 AM - 9:00 AM	SECTION 1	Legal & Ethical Requirements
9:00 AM - 10:00 AM	SECTION 2	The Insurance Agency
10:00 AM - 11:00 AM	SECTION 3	The Insurance Industry and Marketplace
11:00 AM - 12:00 PM	SECTION 4	Communications and Technology
12:00 PM - 12:45 PM		Lunch
12:45 PM - 1:30 PM	SECTION 5	Agency Workflow Components
1:30 PM - 2:15 PM	SECTION 6	Agency Workflow Steps
2:15 PM - 3:15 PM	SECTION 7	Account Management
3:15 PM - 3:45 PM	SECTION 8	Errors & Omissions
3:45 PM - 4:15 PM		Q&A and Review
4:15 PM - 5:15 PM		Examination

Faculty

David A. Thompson, CPCU, AAI, API
FAIA, Tallahassee, FL

Program Location

Address & Phone: **Hilton St. Petersburg Carillon Park**
950 Lake Carillon Drive
St. Petersburg, FL 33716
(727) 540-0050