



Insurance Training and Education Center, Inc.'s ~ 2017 Education Schedule
~ a subsidiary of the Independent Insurance Agents and Brokers of Arizona ~

CIC Agency Management Institute

Agency personnel today must be both professional insurance counselors and sound business people. Learn how to balance these functions by building and maintaining staff support, maximizing customer service, and improving overall operations while increasing the agency's bottom line. This institute combines classroom presentations and group discussions to provide you the opportunity to deal with real issues and problems. It includes: The Agency as an Organization, Managing and Sustaining Financial Strength, Human Resources, Agency Productivity & Effectiveness, and Legal & Ethical Responsibilities. This Institute is approved for 20 hours of Arizona Continuing Education Credit.

Please Note: All participants must present photo identification to the on-site registrar at the course.

PLEASE PRINT!

Resident State: _____ Insurance Lic. #: _____

☐ Mr. ☐ Ms. ☐ Mrs.

Preferred Name for Badge: _____

First Name: _____ M.I. _____ Last Name: _____

Are you taking this institute for C.E. credit?

☐ YES ☐ NO

Designations: _____

Date of Birth: _____

Agency/Company: _____

Address: _____ City: _____ State: _____ Zip Code: _____

Phone: () _____ Fax: () _____

E-Mail Address: _____

Institute Information: Dates: August 9-11, 2017 Room Rate: \$109 Single King Bed if Reserved by 7/9/17

Institute Location: Embassy Suites by Hilton – 4400 South Rural Road – Tempe, AZ 85282 – (480) 897-7444

Agenda: Wednesday, August 9th

8 am – 10:15 pm Agency Organizations
10:15 am – 12:15 pm Understanding and Managing
Financial Strength
1:15 pm – 5:15 pm Agency Planning
5:15 pm – 5:30 pm Exam Review (Optional)

Thursday, August 10th

8 am – 12 pm Agency Productivity & Effectiveness
1 pm – 5 pm Human Resources

Friday, August 11th

8 am – 12 pm Legal & Ethical Responsibilities
2 pm – 4 pm Optional Agency Management Essay Exam

Speakers: **Eric J. Fields**, CIC, CRM, CPA, SPHR, AAI, AFSB, CRIS– TN **Jonathan Persky**, CPA, CIC, PHR – FL **Scott A. Treen**, CIC – OH

Method of Payment:

Receipt? ☐ YES ☐ NO

☐ Check: made payable to ITEC

☐ Credit Card:

☐ VISA

☐ MASTERCARD

☐ AMERICAN EXPRESS

Amount: \$405.00

Card Number: _____ - _____ - _____ - _____ Expiration Date: ____/____ Security Code: _____

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↑ Please Print! ↑

Credit card billing address (Please include zip code): _____

↑ Same address as above? Please circle YES or NO ↑

CANCELLATION POLICY: Full refund if written notification is received seven (7) business days prior to the seminar. Cancellations received after that date will incur a \$105 non-transferable fee. No shows forfeit full registration fees. ITEC reserves the right to cancel or reschedule this event. ITEC is not responsible for airfare, lodging, or other related expenses including airline penalties incurred.