



**Insurance Training and Education Center, Inc.'s ~ 2019 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 16 hours of Arizona Continuing Education Credit.

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

**Contains 3 hours of Ethics credit for Arizona**

**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: June 5-7, 2019 Room Rate: \$109 Single King Bed if Reserved by 5/6/19

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

**Agenda: Wednesday, June 5<sup>th</sup>**

8:15 am - 12:15 pm Strategic Planning  
1:15 pm - 5:15 pm Talent Acquisition and Development

**Thursday, June 6<sup>th</sup>**

8:00 am - 10:00 am Client Acquisition and Retention  
10:00 am - 2:00 pm Technology Utilization

**Thursday, June 6<sup>th</sup> (Continued)**

2:00 pm - 5:00 pm Ethical Responsibility

**Friday, June 7<sup>th</sup>**

8:00 am - 10:00 am Optional Agency Operations Exam

Speakers: **Jim Lawrence, CIC - TX** **Mary A. LaPorte, CIC, CPCU, CPIA, LIC, CPIW - MI**

**Method of Payment:**

Receipt? YES NO

☐ Check: made payable to ITEC

☐ Credit Card:

VISA

MASTERCARD

Amount: \$405.00

AMERICAN EXPRESS

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Credit card billing address (Please include zip code): \_\_\_\_\_

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**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.