



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? Designations: _____
 YES NO Date of Birth: _____

Agency/Company: _____

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

Phone: (_____) _____ Fax: (_____) _____

E-Mail Address: _____

Institute Information: Dates: August 5-7, 2020 Room Rate: \$69 Single King Bed if Reserved by 07/07/20
Institute Location: Four Points by Sheraton Phoenix North – 2532 West Peoria Avenue – Phoenix, AZ 85029 – (602) 943-2341
Agenda: **Wednesday, August 5th** 8:15 am – 12:15 pm Strategic Planning
1:15 pm – 5:15pm Talent Acquisition and Development
Thursday, August 6th 8:00 am – 10:00 am Client Acquisition and Retention
10:00 am – 2:00 pm Technology Utilization
Thursday, August 6th (Continued) 2:00 pm – 5:00 pm Ethical Responsibility
Friday, August 7th 8:00 am – 10:00 am Optional Agency Operations Exam
Speakers: **Bettye D. Hutchison, CIC, CRM, CPCU, ARM, CPIA, AAI – MD** **Bruce McCreadie, CIC, CPIA, AAI – FL**

Method of Payment:

Receipt? YES NO
 Check: made payable to ITEC
 Credit Card: Amount: \$420.00
 VISA MASTERCARD AMERICAN EXPRESS

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

Cardholder's Name: _____ Signature: _____

↑ 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.