

EDUCATION

IIAT presents more than 300 days of training annually at regional locations and in agencies. Most classes qualify for **continuing education credits** toward license renewal. Regional classes for both beginning and experienced agency staff are offered in more than 20 locations. To discuss a custom class packaged for and presented to your agency staff at a location of your choice, contact the IIAT Education staff at 800.880.7428.

You can access the current **calendar** at iiat.org under “Education/Training” on the left menu. You can register online using a credit card, or call our toll-free number and speak to one of our customer service representatives. From this site, you can also download a calendar and registration form for printing.

IIAT classes focus on the training needs of agency staff, including sales people. Each course is written by IIAT staff who have years of experience in the business. The classes are taught by IIAT and contract instructors with proven teaching skills. The resulting product is a learning experience that helps employees grow and serve agency customers.

Watch your e-mail for the monthly ***IIAT Education Alert*** bringing you the latest on classes coming to your area.

EDUCATION

Producer Development Program: An intensive training program for new producers that takes six months off the commercial insurance sales learning curve. This 13-and-a-half-day program is offered twice annually in Austin to producers with less than two years experience.

Paul Martin—pmart@iiat.org

ACSR Designation: IIAT's Accredited Customer Service Representative program in personal lines, commercial lines or life & health products can increase effectiveness of account managers in eight days of training and testing. Over 4,000 designees in Texas. Ideal for boosting the careers of experienced account managers.

Emily Thomas—ethom@iiat.org

Round Up Your CE: Twice annually, IIAT travels to 23 locations to bring the latest changes in insurance and regulation to IIAT members. Earn your required 15 hours of CE each year while learning from the best instructors in the country.

Jim Gavin—jgavi@iiat.org

Custom Training: Choose from more than 50 course segments to construct your own training program, and schedule a time and location convenient to your agency. CE credits when and where you want them.

Paul Martin—pmart@iiat.org

Online Courses: IIAT offers selected courses online through WebCE. Get CE credit from your home or office.

Paul Martin—pmart@iiat.org

License Exam Prep: IIAT's popular self-study guide for exam preparation, together with practice exams on CD. General Lines P/C, Life & Health, MGA, Surplus Lines and Adjusters.

Paul Martin—pmart@iiat.org

Audio/Video Programs: Recorded sessions from IIAT's Joe Vincent Management Seminar and Annual Conference can be used to get CE credits in your agency (minimum of three students and one facilitator).

Stephanie Miller—smiller@iiat.org

New Employee Orientation and Training: Online, self-paced training for new employees is provided on InfoCentral, a service for IIAT members only. This 8-unit course comes with a Mentor's Guide to help the office trainer administer the program and track progress.

Paul Martin—pmart@iiat.org

IIAT Webcast Updates: Live broadcasts use Internet and phone to deliver quarterly presentations on current topics by experts. Your entire staff can participate with one link, and can ask questions of presenters. An easy way to get up-to-date on important issues without leaving your office. Archives available.

CRIS Designation: IIAT's has partnered with IRMI to help agents develop specialized expertise in construction insurance and risk management. Completion of the courses can lead to Construction Risk and Insurance Specialist designation.

Paul Martin—pmart@iiat.org

Virtual University: You can access the IIABA Virtual University for a wide range of additional reference information, online courses, links to other industry web sites and many other resources. Access is included in your dues, but a separate password is required.

**For a complete schedule of education classes, by city, date or subject,
visit iiat.org and click on Education/Training**

COMMUNICATIONS

IIAT is your best information resource for managing your agency, serving your clients and complying with Texas insurance regulations and laws. You can depend on IIAT to keep you and your staff informed on all issues important to your business and the industry.

As a member of IIAT and IIABA you will receive two magazines at no charge. The bi-weekly ***Insurance Journal*** is sent to all IIAT members. ***Independent Agent***, the official publication of Independent Insurance Agents & Brokers of America, is published monthly.

In addition to receiving regular communications, your staff can access thousands of pages of current information at iiat.org. Online registration is required. From the members-only site, you'll discover a wealth of online information. If you or your staff need instruction call IIAT's Member Services Hotline at 800.880.7428.

COMMUNICATIONS

Newsletters: IIAT's bi-weekly e-Newsletter, *Texas Agent*, keeps you informed about current events and issues in Texas insurance, from the agent's perspective. Also from IIAT: *Personal Lines Report*, *Agency Management Brief* and *Advantage Advisor*. (*Texas Agent* and *Personal Lines Report* are archived online at iiat.org.)

To ensure you receive electronic newsletters and alerts, please add alert@ecastiiat.org to your e-mail program's address book or preferred sender list.

iiat.org: The most useful agency web site in the country. Dozens of subject categories, industry news, education schedules, product descriptions and agency management information. For members only.

Insurance Journal: As a member of IIAT, you receive at no cost, a copy of the popular *Insurance Journal*, published bi-weekly. Updated daily online.

InfoCentral: IIAT's premier research library available only via iiat.org, gives you annotated coverage details on Texas and ISO forms, technical policy discussions, coverage and claims articles. All fully searchable.

Independent Agent: Monthly magazine of national news and agency developments published by IIABA. This publication is included with member dues.

**For more information on IIAT publications and communication services, contact:
Linda Timmons—ltimm@iiat.org**

AGENCY MANAGEMENT

Managing an insurance agency in today's regulatory and business environment is a challenge. IIAT staff includes management experts with years of agency experience. They are just a phone call away.

The **InfoCentral** reference library includes dozens of articles, downloadable tools and links to valuable resources that will help you manage your business and comply with Texas insurance regulations. The IIAT Hiring Toolkit provides proven techniques for locating, interviewing and hiring new employees. In addition, an online New Employee Orientation and Training course will help you develop employees quickly.

The **Trusted Choice**[®] marketing brand is available only to members of IIAT and IIABA. IIAT and Trusted Choice offer resources for developing a marketing and advertising program for your agency, including ads for your use locally.

One of the premier educational events of the year in Texas is the **Joe Vincent Management Seminar**, devoted exclusively to agency owners and managers. This 3-day program includes multiple workshops and presentations focused on the latest and most successful management techniques. The event is held in Austin in late January or early February.

AGENCY MANAGEMENT

Caliper Testing: IIAT-endorsed testing service measures work behavior, attitudes and strengths – helps you hire the right person.

IIAT Technical Tests: Evaluate the insurance knowledge and experience of employee prospects in either personal or commercial lines.

License Test Prep: IIAT has partnered with Able Inc. to provide discounted access to the ExamFX Online Training Program. General Lines P/C, Life & Health, MGA, Surplus Lines and Adjusters.

Hiring and Compensating Employees: Access InfoCentral to get great publications on locating and hiring producers, creating an orientation and training program for new employees, compensating employees, and more.

Paul Martin—pmart@iiat.org

Agency Management References: On InfoCentral, you'll find six sections of practical, how-to advice for operating a successful agency; sections include Finance, Legal Compliance, Operations, Sales and Management, Strategic Planning, Products and Services.

Resources: Get the resources needed to start an agency, find a consultant, or stock your bookshelves with research publications. IIAT's members-only web site provides information free of charge for busy managers.

Best Practices: Published by IIABA, this series of benchmark studies helps independent agents compare their agency results with agencies of similar size around the country. The series includes helpful publications for targeting a variety of agency operations.

Trusted Choice: A national marketing brand available only to IIABA members, Trusted Choice offers agencies marketing materials, ads and a national web site for consumers. As of Sept. 1, 2007 access is free for IIAT agency members.

David VanDelinder—dvand@iiat.org

E&O Loss Control: InfoCentral offers an exclusive professional liability loss control guide that lets you tailor your loss-control protection to your own operation. Classroom and video loss-control instruction are available.

Joe Vincent Management Seminar: Devoted to agency management issues, this conference draws more than 350 top agency principals and managers in the state each year.

David Surles—dsurl@iiat.org

Publications: *Best Practices for Certificates of Insurance; Best Practices for Managing Markets; Best Practices for Working with Wholesalers; Best Practices for Personal Lines; Texas Agency Performance Study; BANG! Getting the Most from Your Ad Dollars.*

Matchmaker: For agencies looking to consolidate, perpetuate, buy or sell IIAT offers a free, confidential exchange resource. For candidates and those seeking candidates.

Rick Bondurant—rbond@iiat.org.

Agency Management Brief: The newest agency management resource bringing you emerging agency management trends and keeping you abreast of the growing volume of management reference material on InfoCentral. *published quarterly*

Rick Bondurant—rbond@iiat.org

GOVERNMENTAL AND REGULATORY AFFAIRS

Your dues include professional representation of your interests before U.S. Congress, the Texas Legislature and the Texas Department of Insurance. Hundreds of hours each year are spent proudly voicing the concerns and opinions of independent insurance agents by IIABA and IIAT staff.

The IIAT **grassroots legislative contact program** is the most influential in the industry. We seek and nurture local agent contacts with key legislators and provide a bi-annual opportunity in Austin for legislator visits. If you have a special relationship with a Texas legislator, call us for information about how you can participate.

The IIAT political action fund, **IMPACT**, is one of the largest in the state, and the largest insurance industry PAC in Texas. Each year, agents give generously to IMPACT in support of pro-business state legislative candidates. Texas agents also support **InsurPac**, the national legislative fund for congressional races.

Our close relationship with the **Texas Department of Insurance** ensures that your voice will be heard as regulations are drafted and rules published. The online InfoCentral reference library includes an explanation of current regulations.

GOVERNMENTAL & REGULATORY AFFAIRS

Legislative Activities: IIAT and IIABA offer highly successful lobbying programs to protect the interests of independent agents. Your state and national political action funds, **IMPACT** and **InsurPac**, support pro-business candidates. Grassroots contacts keep legislators in tune with our views. You can view an analysis of the latest laws at iiat.org.

Lee Loftis—lloft@iiat.org

Regulatory Activities: IIAT stays in touch with regulators on key industry issues. IIAT contacts and oversight result in effective regulation of our industry and protect agents from rules that only add cost and time. IIAT and agent volunteers regularly participate in hearings and meetings to present agents' views on important issues.

Lee Loftis—lloft@iiat.org

The Courts: IIAT monitors and reports court decisions that impact agents and their customers. IIAT also files briefs in cases that could impact the agency business or the financial interests of independent agents. Latest decisions are reviewed at iiat.org.

David Surles—dsurl@iiat.org

Technical Services: IIAT's technical services group keeps you informed on the latest coverage and regulatory issues. From personal lines to risk management, IIAT has the answers and suggestions for communicating with your insureds. Most of this information is available on InfoCentral.

Regina Anderson—rande@iiat.org

For the latest Governmental Affairs Updates visit iiat.org

MARKETS/IIAT ADVANTAGE PROGRAMS

IIAT Advantage provides both insurance and non-insurance products for your agency and insurance markets you can access to serve your customers. You can learn about the latest markets we offer, and how to register for access, at iiat.org.

IIAT Insurance Agency offers access to the best **Errors and Omissions** policy available, through Westport Insurance Corp. This national group program ensures a stable market for all independent agencies. E&O coverage through other insurers is available for agencies that need or want an alternative to Westport. IIAT Insurance Agency has professional underwriters on staff to assist you with application.

IIAT Advantage Markets allow you to access insurance markets, both admitted and surplus, with competitive commissions. Advantage programs address markets not adequately served by the many fine carriers and MGAs in our state. In many of the market programs, agents may obtain a direct contract with carriers once qualifications are met. Call IIAT at 800.880.7428 for information about how you can represent IIAT Advantage markets.

IIAT Advantage Business Partners offer a variety of business services at discounts negotiated by IIAT Advantage for members. The list of partners is always changing as we discover new and unique services members need to manage their businesses.

Watch your e-mail for the monthly **IIAT Advantage Advisor** bringing you the latest on IIAT Advantage insurance markets and business partners. The quarterly **E&O Update** is provided as a service to IIAT Insurance Agency E&O policyholders

(IIAT Advantage and IIAT Insurance Agency are endorsed by and compensation is paid to the Independent Insurance Agents of Texas.)

MARKETS/IIAT ADVANTAGE PROGRAMS

Insurance for Your Agency

E&O Insurance: IIAT Insurance Agency offers broad E&O coverage tailored to your agency's needs through the two largest admitted E&O underwriters in the country...Westport Insurance Corp. and Fireman's Fund. Managed by IIAT volunteers and staff. Loss control and loss-free credits available.

David Surles—dsurl@iiat.org
Jennifer Fudge—jfudg@iiat.org

Additional Coverages: IIAT Advantage endorses a dental and vision insurance program, disability insurance and group AD&D for your staff through Kelsey National.

Bill Wade—bwade@iiat.org

Premium Finance

BankDirect Capital Finance offers quality insurance financing solutions and services to meet the needs of all your accounts. Benefits include: revenue generation for your agency; competitive rates; service backed by IIAT and state of the art technology.

Bill Wade—bwade@iiat.org

IIAT Advantage Markets: for your customers

Comp Connection: Fast service, high commission workers' comp coverage from Service Lloyds. From \$1,000 to \$150,000. You won't find a better workers' comp company.

Personal Lines: Standard personal lines market from Travelers, The Republic Group and The Hartford for qualified small agencies unable to meet carrier-imposed volume requirements.

Personal Umbrella: Stand-alone personal umbrellas from RLI. Great commissions, fast service from one of the top umbrella companies in the country.

Commercial Lines: Travelers offers a standard market for main street business with a variety of products. Insurors Indemnity offers a competitive and comprehensive small-medium Texas business package.

Flood Insurance: Travelers write-your-own residential and business program with no minimum premium volume and great commissions. Book roll-over programs also available.

Farm and Ranch: Quick quoting online, experienced underwriters and competitive commissions from The Republic Group and Stroud National Agency.

Mexico Tourist Auto: Competitively priced, instant issue online auto policy for travel in Mexico from Mexico Insurance Professionals.

IIABA's Big I Markets: Register with IIABA for specific programs dealing with community banks, special events and high value homeowners.

(IIAT Advantage and IIAT Insurance Agency are endorsed by and compensation is paid to the Independent Insurance Agents of Texas.)

IIAT Advantage Business Partners	
<p>Trak-1: Online background screening and loss-prevention tool offered through an IIAT and Trak-1 joint partnership. Agents can offer the product to customers, as well as use it for hires in the agency.</p>	<p>InsurBanc: A full service bank created by agents to serve agencies. InsurBanc manages agency accounts, maximizes cash flow and provides loans to agents seeking to expand or acquire new business.</p>
<p>Artizan: Twenty-four hour and emergency CSR services are provided by a proven national company that partners with agencies to maintain critical contact with the agency customers. Discounted to IIAT members.</p> <p>Turnkey and custom designed web sites for independent agencies.</p>	<p>Agility Recovery Solutions: Disaster recovery services to help agents and their clients maintain critical services following a catastrophe, whether a local or regional event. Agents pay a fee, discounted to IIAT members, to access on-site recovery equipment.</p>
<p>WebCE: Online CE-approved education programs written by IRMI, a premier risk management services company in Dallas. IIAT members get discounts for package purchases. Easy to use and quick.</p>	<p>IRMI: Discounted products from the leading research firm in the insurance industry, International Risk Management Institute.</p>
<p>MarshBerry: Financial, operational, sales management and organizational services.</p>	<p>Appulate: Web-based programs for supplemental applications (GL & WC – think contractors accounts) and a new loss runner program.</p>
<p>VIP: National marketing organization offering life and voluntary benefits programs with exclusive distribution through P&C agencies and financial institutions.</p>	
Market Resources	
<p>Markets Search: An online database of market information in personal lines and special program business on the Internet. More than 90 coverage categories and dozens of markets.</p> <p>Regina Anderson—rande@iiat.org</p>	<p>Company Appointment Guide: IIAT's annual survey of standard companies interested in appointments with Texas agencies. Available online and included with your dues.</p> <p>Regina Anderson—rande@iiat.org</p>
<p>Bill Wade—bwade@iiat.org Peter Uhrig—puhri@iiat.org Polly Middlebrook—pmidd@iiat.org</p>	

MEMBER ACTIVITIES

IIAT is a **volunteer-driven organization** governed by a Board of Directors composed entirely of independent insurance agents. More than 100 volunteers serve on committees and other organizational groups to develop new services for association members. Call us if you are interested in volunteer service.

IIAT membership provides a variety of **annual events** where you can build contacts and share information with other agents, company representatives, brokers and vendors.

MEMBER ACTIVITIES

Committees, Advisory Councils, Task Forces

A Board of Directors composed of 13 agents, backed by nearly 100 volunteers serving on Advisory Councils and Task Forces help ensure that IIAT programs are practical and agency-specific. If you would like to serve in a volunteer capacity with the IIAT organization, contact **Cindy Quy** at cquy@iiat.org for more information.

Annual Meetings

IIAT Annual Conference & Trade Show: Two days of top-notch speakers, CE workshops, exhibits and entertainment, plus the chance to mix with nearly 1,000 industry colleagues. Don't miss the most exciting meeting in the Texas insurance business. *In June*

Cindy Quy—cquy@iiat.org

Joe Vincent Management Seminar: Devoted to agency management issues, this conference draws more than 400 top agency principals and managers in the state each year. *In late January or early February*

Rick Bondurant—rbond@iiat.org

Young Agents Retreat: A special meeting for the under-41 members of IIAT. Share experiences, hear top national speakers and visit with company personnel. *In October*

Paul Martin—pmart@iiat.org

Legislative Day: Held in conjunction with the Joe Vincent Management Seminar in odd numbered years, this program connects IIAT members with local legislators during the biennial session.

Lee Loftis—lloft@iiat.org

Local Associations: More than 20 active local associations provide opportunities for agents to mix professionally and socially with colleagues. Local association membership is optional but highly recommended.

Ashley Skeens—askeens@iiat.org

Small Agency Conference: This annual meeting is geared to the needs of agency owners, writing mostly small accounts. Provides CE, networking and market access. *In September*

Bill Wade—bwade@iiat.org