

IIAP

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**INSURANCE
INSTITUTE FOR
ASIA AND THE
PACIFIC, INC.**

TRAINING CALENDAR

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INSURANCE COURSES AND SEMINARS

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COURSE TITLE: Basic Non-Life Insurance Course (BNL)

COURSE OBJECTIVE: This course will provide an introduction to the basic concepts and principles of Insurance and the features of basic nonlife products. This serves as a pre-licensing course for non-life insurance agents in lieu of taking and passing the pre-licensing examination of the Insurance Commission.

WHO SHOULD ATTEND: This course is a must for all who deal with nonlife Insurance products either as a buyer or a seller. It is also designed for new employees and agents of nonlife insurance companies, brokerage houses, adjustment companies, insurance agencies and bank employees who are assigned to insurance departments. It is also recommended for those who want to start or pursue a career in insurance. It serves as a refresher course for those already working in insurance that need to be updated on the current provisions and new products. It is a required course for those who want to get an underwriter's license on Fire, Marine or Casualty lines. It is a course certified by the *Chartered Insurance Institute (London)* and leads to a *Cert CII international designation*.

SESSION OUTLINE:

- I. Introduction to Insurance
- II. Personal Accident Insurance
- III. Motor Car Insurance
- IV. Fire (Property) Insurance
- V. Engineering Insurance
- VI. Marine Insurance
- VII. Miscellaneous Casualty Insurance
- VIII. Suretyship
- IX. Claims
- X. Reinsurance
- XI. Review Part I (Introduction to Engineering)
- XII. Review Part II (Marine to Reinsurance)
- XIII. Comprehensive Examination Part I
- XIV. Comprehensive Examination Part II

A. WEBINAR SCHEDULE: 1:00 to 4:00 PM; Monday to Friday

NO. OF SESSIONS: 14

DATES:	288 th BNL	January 11-28, 2021
	289 th BNL	February 3-23, 2021
	290 th BNL	March 8-25, 2021
	291 st BNL	April 12-29, 2021
	292 nd BNL	May 10-28, 2021
	293 rd BNL	June 7-24, 2021

294 th BNL	July 5-23 2021
295 th BNL	August 9-26, 2021
296 th BNL	September 6-23, 2021
297 th BNL	October 4-21, 2021
298 th BNL	November 8-25, 2021

B. HOME STUDY PROGRAM: *The participant must finish the program within 6 months.*

COURSE FEE (EXCLUDING VAT):

IIAP Member: P11,000 IIAP Alumni: P11,500 For All Others: P12,000

COURSE TITLE: Intermediate Course on Fire (Property) Insurance

PRE-REQUISITE: Basic Non-Life Insurance Course

DATES: January 18-25, 2021
May 10-18, 2021
July 7-14, 2021

WEBINAR SCHEDULE: 1:00-4:00 PM; Monday to Friday

NO. OF SESSIONS: 6

COURSE OBJECTIVE: This course shall enable a student to gain a deeper understanding of the clauses and provisions of the Standard Fire Policy and discuss issues related to those provisions. It also features the Fire Tariff Manual and allows the student to work on typical cases on fire insurance.

WHO SHOULD ATTEND: For those who have completed the BNL and would like to know more about Property Insurance and/or obtain an underwriter's license in Fire Insurance.

SESSION OUTLINE:

- I. Review of the Basic Principles of Fire Insurance
- II. The Standard Fire Insurance Policy
- III. Warranties and Clauses
- IV. Underwriting
Philippine Fire Tariff
- V. Cases on Fire Insurance (Case Studies)
- VI. Comprehensive Examination

COURSE FEE (EXCLUDING VAT):

IIAP Member: P8,500

IIAP Alumni: P9,000

For All Others: P9,500

COURSE TITLE: Advanced Course on Fire (Property) Insurance

PRE-REQUISITE: Basic Non-Life Insurance Course and Intermediate Course on Fire (Property) Insurance

WEBINAR SCHEDULE: August 9-23, 2021 (1:00-4:00PM; Monday to Friday)

NO. OF SESSIONS: 11

COURSE OBJECTIVE: This is the third and final requirement of the Insurance Commission towards getting a Fire Underwriter's license. It aims to equip the students with all the skills needed by a fully-functional fire underwriter. It features an in-depth discussion of allied perils, business interruption, rate-making, surveying, loss adjustment and fire protection devices.

- I. Insurance Code Provisions on Fire Insurance
- II. Issues on Philippine Fire Tariff
- III. Extraneous or Allied Perils
- IV. Business Interruption
 - US and UK Form
 - Comparison (US vs UK form)
- V. Fire Protection Chemistry
- VI. Comprehensive Examination (Part 1)
- VII. Property Rate-Making
- VIII. Probability Theories/Statistics
- IX. Property Loss Adjustment
- X. Property Risk Management
 - Rating and Surveying
 - Actual Inspection
- XI. Comprehensive Examination (Part 2)

COURSE FEE (EXCLUDING VAT):

IIAP Member: P11,000

IIAP Alumni: P11,500

For All Others: P12,000

COURSE TITLE: Intermediate Course on Marine Insurance

PRE-REQUISITE: Basic Non-Life Insurance Course

DATES: March 15-19, 2021
June 14-18, 2021

WEBINAR SCHEDULE: 1:00-4:00PM; Monday to Friday

NO. OF SESSIONS: 5

COURSE OBJECTIVE: To acquire more detailed knowledge about the theory and practice of Marine Insurance with specific and in-depth treatment of the provisions, clauses and warranties in Marine Cargo and Hull Policies.

WHO SHOULD ATTEND: New or existing Staff in the Marine Insurance Department of Insurance Companies, Risk Managers of maritime-related companies and others who are interested in learning more about Marine Insurance.

SESSION OUTLINE:

- I. Review of Basic Marine Insurance
- II & III. Marine Cargo Insurance
 - Underwriting information required for assessment of risk
 - Insurance Clauses and Warranties
 - Claims handling and recoveries
- IV. Marine Hull Insurance
 - Underwriting information required for assessment of risk
 - Insurance Clauses and Warranties
 - Claims handling and recoveries
- V. Comprehensive Examination

COURSE FEE (EXCLUDING VAT):

IIAP Member: P8,500

IIAP Alumni: P9,000

For All Others: P9,500

COURSE TITLE: Advanced Course on Marine Insurance

PRE-REQUISITE: Basic Non-Life Insurance Course and Intermediate Course on Marine Insurance

WEBINAR SCHEDULE: September 13-27, 2021 (1:00-4:00PM; Monday to Friday)

NO. OF SESSIONS: 11

COURSE OBJECTIVE: To acquire sufficient knowledge and skills to properly underwrite Marine Insurance. This is the third required course leading to the issuance of a Marine Underwriter's license by the Insurance Commission.

WHO SHOULD ATTEND: Those who are serious in pursuing a career in Marine Insurance and intent in getting an underwriter's license from the Insurance Commission.

SESSION OUTLINE:

- I. Review of Basics of Marine Insurance
- II. Marine Cargo Insurance
 - Special Types of Claims
- III. Underwriting Marine Cargo Insurance
 - Cases on Marine Cargo Insurance
- IV. Claims Cases
- V. Comprehensive Examination (Part 1)
- VI. Marine Hull Insurance
 - Protection and Indemnity (P&I)
- VII. Underwriting Marine Hull Insurance
 - Cases on Marine Hull Insurance
- VIII. General Average
- IX. Freight, Disbursement and Premiums
 - Loss of Hire
- X. Inland Marine and Aviation Insurance
- XI. Comprehensive Examination (Part 2)

COURSE FEE (EXCLUDING VAT):

IIAP Member: P11,000

IIAP Alumni: P11,500

For All Others: P12,000

COURSE TITLE: Intermediate Course on Miscellaneous Casualty Insurance

PRE-REQUISITE: Basic Non-Life Insurance Course

DATES: February 15-19, 2021
August 16-20, 2021

WEBINAR SCHEDULE: 1:00-4:00PM; Monday to Friday

NO. OF SESSIONS: 5

COURSE OBJECTIVE: For the participants to acquire a broader and more comprehensive knowledge on the theory and practice of Liability Insurance. This also serves as a suitable preparation for the Advanced Course.

WHO SHOULD ATTEND: Those who are currently/or plan to work in the Casualty Department of Insurance Companies. Also for those actuarial students who are pursuing a career to become Casualty Actuaries. It is also a nice follow-up seminar to the BNL for all interested in Casualty as the third major class of insurance after Fire and Marine.

SESSION OUTLINE:

- I. Review of the Miscellaneous Casualty Insurance
- II. Types of Miscellaneous Casualty Insurance
- III. Underwriting Miscellaneous Casualty Insurance
- IV. Claims/ Cases
- V. Comprehensive Examination

COURSE FEE (EXCLUDING VAT):

IIAP Member: P8,500

IIAP Alumni: P9,000

For All Others: P9,500

COURSE TITLE: Advanced Course on Miscellaneous Casualty Insurance

PRE REQUISITE: Basic Non-Life Insurance Course & Intermediate Course on Miscellaneous Casualty Ins.

WEBINAR SCHEDULE: October 11-25, 2021 (1:00-4:00PM; Monday to Friday)

NO. OF SESSIONS: 11

COURSE OBJECTIVE: To provide participants with a thorough knowledge of all the classes and sub-classes of Casualty Insurance. It will include not only the more common types of casualty coverage like Personal Accident Insurance and Motor Car, but the other not-so-common types of casualty lines such as Public Liability Insurance, Crime Insurance, Special Risk Insurance and Poultry and Livestock.

WHO SHOULD ATTEND: For those who are working towards getting a Casualty Underwriter's license from the Insurance Commission. Also for those who want to specialize and be effective as an underwriter for Casualty Insurance Lines.

SESSION OUTLINE:

- I. Miscellaneous Casualty Insurance
 - Comprehensive General Liability Insurance
 - Comprehensive Personal Liability Insurance
 - Owners, Landlords, and Tenants Liability Insurance
 - Manufacturers and Contractors Liability Insurance
 - Completed Operations and Products Liability Insurance
 - Contractual Liability Insurance (Owners' and Contractors' Protective Liability)
 - Excess Liability Insurance
 - Umbrella Liability Insurance
 - Professional Liability Insurance (Directors & Officers, Errors & Omission, Malpractice Insurance)
- II. Crime Insurance
 - Comprehensive Money and Securities, Payroll Robbery Insurance
 - Fidelity Guarantee Insurance
 - Comprehensive Dishonesty, Disappearance, and Destruction Insurance
 - Bankers Blanket Bond
- III. Comprehensive Examination (Part 1)
- IV. Special Risk Insurance
 - Equipment Floater Insurance
 - Personal Effects/Valuable Personal Articles Insurance
 - Comprehensive Plate Glass Insurance
- V. Poultry and Livestock
- VI. Cases and Applications
- VII. Claims
- VIII. Marketing of Miscellaneous Casualty Lines
- IX. Comprehensive Examination (Part 2)

COURSE FEE (EXCLUDING VAT):

IIAP Member: P11,000

IIAP Alumni: P11,500

For All Others: P12,000

COURSE TITLE: Intermediate Course on Reinsurance

PRE-REQUISITE: Basic Non-Life Insurance Course

WEBINAR SCHEDULE: April 19-23, 2021 (1:00-4:00PM; Monday to Friday)

NO. OF SESSIONS: 5

COURSE OBJECTIVE: To enable the participants to acquire a deeper knowledge of the theory and practice of Reinsurance, its forms and types. It also covers Reinsurance Accounting and an extensive explanation of the Reinsurance Process Flow.

WHO SHOULD ATTEND: For all those who are or will need to understand in more detail Facultative and Treaty, Proportional and Non-Proportional Reinsurance to be effective in their jobs. All employees who, in the course of their daily functions, will have to deal with reinsurance contracts and issues will also benefit from attending the course.

SESSION OUTLINE:

- I. Introduction
 - Review of Fundamentals of Reinsurance
- II. Types of Reinsurance Arrangements
 - Proportional and Non-Proportional Reinsurance
- III. Reinsurance Accounting
- IV. Reinsurance Process Flow (Cases)
- V. Comprehensive Examination

COURSE FEE (EXCLUDING VAT):

IIAP Member: P8,500

IIAP Alumni: P9,000

For All Others: P9,500

COURSE TITLE: Advanced Course on Reinsurance

PRE-REQUISITE: Basic Non-Life Insurance Course and Intermediate Course on Reinsurance

SCHEDULE: August 11-17, 2021 (1:00-4:00PM; Monday to Friday)

NO. OF SESSIONS: 5

COURSE OBJECTIVE: To enable the participants to develop a reinsurance program for their companies. Also to equip them with skills to review any reinsurance treaty that their company will be involved in.

WHO SHOULD ATTEND: For those who wish to specialize in reinsurance in their careers or those in the R/I Departments of Ceding Companies.

SESSION OUTLINE:

- I. Review of Fundamentals of Reinsurance
 - Proportional and Non-Proportional Reinsurance
- II. Reinsurance Contract Provisions
Workshop/Cases
- III. Preparing Reinsurance Program
Reinsurance Administration
- IV. Inward Reinsurance
- V. Comprehensive Examination

COURSE FEE (EXCLUDING VAT):

IIAP Member: P8,500

IIAP Alumni: P9,000

For All Others: P9,500

COURSE TITLE: Advanced Course on Motor Insurance

PRE-REQUISITE: Basic Non-Life Insurance Course

DATES: February 22- March 1, 2021
May 24-28, 2021
September 20-24, 2021

WEBINAR SCHEDULE: (1:00-4:00PM; Monday to Friday)

NO. OF SESSIONS: 5

COURSE OBJECTIVE: The Course shall provide skills needed by a Motor Car Underwriter. It is the second requirement towards obtaining a Motor Car Underwriter's license from the Insurance Commission. It features cases on motor underwriting, claims, marketing and pricing. It will also allow the professional to keep abreast of the growing challenges in the motor insurance market in the country.

WHO SHOULD ATTEND: This course is addressed to all who would like to know more about Motor Car Insurance. It is principally designed for motor car department technical staff, professionals and executives but is a useful course even for those working in other lines. The insurance managers of companies (as buyers of motor car insurance) will also benefit from the course.

SESSION OUTLINE:

- I. Review of Basic of Motor Insurance
- II. Motor Underwriting
 - Cases on Underwriting
- III. Motor Claims / Cases on Claims
- IV. Motor Insurance Marketing
 - Government Regulations affecting Motor Insurance
 - Motor Car Pricing Structure
- V. Comprehensive Examination

COURSE FEE (EXCLUDING VAT):

IIAP Member: P8,500

IIAP Alumni: P9,000

For All Others: P9,500

COURSE TITLE: Advanced Course on Personal Accident and Health Insurance

PRE-REQUISITE: Basic Non-Life Insurance Course

WEBINAR SCHEDULE: March 22-26, 2021 (1:00-4:00PM; Monday to Friday)

NO. OF SESSIONS: 5

COURSE OBJECTIVE: To enable the BNL graduate to acquire an extensive view of the necessary theories and practices in Accident and Health Insurance. The course shall cover principles and operations, particularly the various forms of individual and group health insurance, group employee benefit plans and the scope of the social insurance system.

WHO SHOULD ATTEND: For those who want to specialize on Accident and Health products and complete their understanding of these insurance lines.

SESSION OUTLINE:

- I. Review of the Personal Accident Policy Conditions
- II. Underwriting – Individual and Group PA
 - Reinsurance and Claims
- III. Health Insurance
 - Individual and Group
 - Claims
 - Difference between Health Insurance and HMO
- IV. Types of Products
Marketing Techniques and Trends
- V. Comprehensive Examination

COURSE FEE (EXCLUDING VAT):

IIAP Member: P8,500

IIAP Alumni: P9,000

For All Others: P9,500

COURSE TITLE: Advanced Course on Engineering Insurance

PRE-REQUISITE: Basic Non-Life Insurance Course

WEBINAR SCHEDULE: April 6-16, 2021 (1:00-4:00PM; Monday to Friday)

NO. OF SESSIONS: 8

COURSE OBJECTIVE: The objective is to help the student gain sufficient understanding of Engineering Insurance Products and Practices to be able to sell service and manage the engineering insurance portfolio of an insurance company.

WHO SHOULD ATTEND: For all those who are interested in Engineering Insurance and those who are currently working or will work in that department in an insurance company.

SESSION OUTLINE:

- I. Introduction
Contractors All Risks Insurance Policy (CAR), Erection All Risks Insurance Policy (EAR)
- II. Underwriting – CAR and EAR
- III. Comprehensive Examination (Part 1)
- IV. Boiler and Pressure Vessel, Machinery Breakdown and Loss of Profit Policy Conditions and Underwriting
- V. Deterioration of Stocks and Electronic Equipment Insurance Policy Conditions and Underwriting
- VI. Appropriate Reinsurance
- VII. Claims/Cases
- VIII. Comprehensive Examination (Part 2)

COURSE FEE (EXCLUDING VAT):

IIAP Member: P9,000

IIAP Alumni: P9,500

For All Others: P10,000

COURSE TITLE: Business Interruption Insurance Course

PRE-REQUISITE: Basic Non-Life Insurance Course

WEBINAR SCHEDULE: May 17-24, 2021 (1:00-4:00PM; Monday to Friday)

NO. OF SESSIONS: 6

COURSE OBJECTIVE: To provide a detailed understanding of the provisions and forms of Business Interruption Insurance.

WHO SHOULD ATTEND: In general, it is for all interested in this growing line of business. It is a necessary study for those who wish to study the role of Business Interruption in completing the risk management program of any entity. The course is highly recommended for those who will sell, manage and service the Business Interruption portfolio of an insurance company. Also recommended to all risk managers of various institutions who are planning to avail of the product.

SESSION OUTLINE:

- I. Introduction to Business Interruption
Underwriting Business Interruption Insurance
- II. British Form
- III. American Form
- IV. Comparison (British vs. American Form)
- V. Claims
- VI. Comprehensive Examination

COURSE FEE (EXCLUDING VAT):

IIAP Member: P8,500

IIAP Alumni: P9,000

For All Others: P9,500

COURSE TITLE: Condominium Insurance

PRE-REQUISITE: Basic Non-Life Insurance Course

DATES: March 23-26, 2021
July 27-30, 2021

WEBINAR SCHEDULE: 9:00AM to 12:00NN; Tuesday to Friday

NO. OF SESSIONS: 4

COURSE OBJECTIVE: To provide a comprehensive discussion on the need, coverage and limitations of Condominium Insurance. It shall focus on the nature and legal aspects of condominium ownership, the risks assumed by unit owners, association officers, project developers, building administrators and lending institutions, and the instruments available to handle such risks.

WHO SHOULD ATTEND: For all who are selling the product and all those who will service the policies. All nonlife insurance agents and employees, insurance intermediaries and property underwriters will benefit from this course. It is also a worthwhile seminar for all condominium unit owners and administrators.

SESSION OUTLINE:

- I. Legal Aspect
 - Condominium Law/ Republic Act No. 4726
 - Master Deed
 - Sales Contract
 - Insurable Interest
 - Condominium Insurance
 - Individual Unit Owners
- II. Property Insurance Aspect
 - Condominium Corporation
 - Condominium Unit Owners
- III. Liability Insurance Aspect
 - Legal Liability
 - Condominium Corporation
 - Unit Owners
 - Directors and Officers Liability
 - Insurance Packages
- IV. Comprehensive Examination

COURSE FEE (EXCLUDING VAT):

IIAP Member: P5,000

IIAP Alumni: P5,500

For All Others: P6,000

COURSE TITLE: Advanced Course on Suretyship

PRE-REQUISITE: Basic Non-Life Insurance Course

WEBINAR SCHEDULE: June 15-25, 2021 (1:00-4:00PM; Monday to Friday)

NO. OF SESSIONS: 9

COURSE OBJECTIVE: To provide participants with an extensive knowledge of various aspects of Suretyship including familiarity with the many different kinds of bonds, processing of applications, bond applicants, financial statements, loss recoveries, relevant laws and regulations, bond reinsurance and underwriting techniques. An additional session on Laws of Suretyship has been added.

WHO SHOULD ATTEND: For those who want a more detailed appreciation of Bonds as a business. It is recommended for those who wish to specialize in Suretyship to be able to underwrite Bonds.

SESSION OUTLINE:

- I. Review of General Principles
- II. Contractors Bond
 - Bidder's Bond
 - Surety Bond
 - Performance Bond
 - Warranty Bond
- III. Judicial Bond
- IV. Customs Bond
License and Permit Bond
- V. Underwriting of Bonds
 - 3Cs of Underwriting (Character, Capacity and Capital)
- VI. Co Suretyship and Bond Reinsurance
- VII. Analysis of Financial Statements
- VIII. IC Statutory Provisions (Laws on Suretyship)
Bond Claims and Recovery
- IX. Comprehensive Examination

COURSE FEE (EXCLUDING VAT):

IIAP Member: P9,000

IIAP Alumni: P9,500

For All Others: P10,000

TITLE: Advanced Course on Loss Adjustment

PRE-REQUISITE: Basic Non-Life Insurance Course

WEBINAR SCHEDULE: February 9-23, 2021 (1:00-4:00PM; Monday to Friday)

NO. OF SESSIONS: 10

COURSE OBJECTIVE: The course covers the professional loss adjustment function. It establishes the framework within which the adjuster exercises his profession and provides essential inputs required for understanding and doing actual adjustment work.

WHO SHOULD ATTEND: For those seeking to pursue a career in Loss Adjustment, as well as by in-house claims persons, brokers, agents who wish to acquire a comprehensive knowledge of the loss adjustment function.

SESSION OUTLINE:

- I. General Principles of Loss Adjustment
 - Background of Loss Adjustment
 - Role of an adjuster
- II. Investigation, Evaluation and Reporting
 - Introduction, Cause of Loss,
 - Evaluation and Reporting
- III & IV. Fire Loss Adjustment
 - Determination of Sound Value and Loss
 - Negotiation
 - Reporting
- V. Comprehensive Examination (Part 1)
- VI and VII. Miscellaneous Casualty Loss Adjustment
 - Casualty and Liability
 - Public Liability
 - Other Casualty Policies (Motor and PA)
- VIII & IX. Marine and Aviation Loss Adjustment
 - Marine Cargo Loss Adjustment
 - Marine Hull Loss Adjustment
 - Aviation Loss Adjustment
- X. Comprehensive Examination (Part 2)

COURSE FEE (EXCLUDING VAT):

IIAP Member: P9,000

IIAP Alumni: P9,500

For All Others: P10,000

COURSE TITLE: Insurance Claims

PRE-REQUISITE: Basic Non-Life Insurance Course

DATES: April 12-27, 2021
November 8-23, 2021

WEBINAR SCHEDULE: 1:00-4:00PM; Monday to Friday

NO. OF SESSIONS: 12

COURSE OBJECTIVE: When an insurance claim develops, certain parties become gravely affected; the insurer is concerned with the depletion of its resources, the insured is anxious to secure prompt reparation and the claimsmen's sense of fairness is put to test. This course examines the consequences and presents the proper procedures in the handling and the treatment of insurance claims. Cases and examples will be given for better understanding of the process.

WHO SHOULD ATTEND: For all those who are wishing to make a career in the claims profession as well as those who are currently handling claims and wish to obtain further knowledge.

SESSION OUTLINE:

- I. Introduction to Claims
The Role of the Claims Department and the Adjuster
- II. Motor Car Claims
- III. Accident & Health Claims
- IV. Fire Loss Claims/Adjustment
- V. Engineering Claims
- VI. Comprehensive Examination (Part I)
- VII. Business Interruption Claims /Adjustment
- VIII. Marine Cargo Claims
- IX. Hull Survey & Claims
General Average Claims
- X. Crime Loss Claims/ Public Liability Claims
- XI. Surety Bond Claims & Recoveries
- XII. Comprehensive Examination (Part II)

COURSE FEE (EXCLUDING VAT):

IIAP Member: P11,000

IIAP Alumni: P11,500

For All Others: P12,000

COURSE TITLE: Basic Modern Motor Vehicle Systems and Collision Damage Repair Estimating

DATES: April 7, 2021
October 27, 2021

WEBINAR SCHEDULE: 9:00AM – 4:00PM; Wednesday

NO. OF SESSION: 1 day

COURSE OBJECTIVE: This is designed to familiarize the participants particularly on Claims and Sales Department with the necessary knowledge on basic automotive system, its operation, and the basic collision parts of the automobile. To understand and perform basic auto body repair estimate.

WHO SHOULD ATTEND: For those who are working with motor underwriting, claims, sales department.

SESSION OUTLINE:

- I. Anatomy of modern motor vehicles (construction and systems)
- II. Collision and collision damage
- III. Estimating collision damage repair
- IV. Case study of 4 collision cases

COURSE FEE (EXCLUDING VAT):

IIAP Member: P4,500

IIAP Alumni: P5,000

For All Others: P5,500

COURSE TITLE: Non-Life Insurance Course for Agents

WEBINAR SCHEDULE: February 22-26, 2021 (9:00AM – 4:00PM; Monday to Thursday)

NO. OF SESSIONS: 3.5 days

COURSE OBJECTIVE: This course serves as a pre-licensing course for non-life insurance agents. Passers are exempted from the examination given by the Insurance Commission.

WHO SHOULD ATTEND: Agent-recruits or existing agents (who want to review the principles, concepts, and features of various insurance products).

SESSION OUTLINE:

- I. Introduction
 - Insurance Contracts
 - Proposals & Policy Forms
 - General Principles
 - OIC Supervision & Agent's Ethics
 - Personal Accident Insurance
- II. Fire/Property Insurance & Allied Perils
 - Motor Car Insurance
- III. Overview of Marine
 - Overview of Suretyship
 - Overview of Liability Insurance
 - Overview of Claims
 - Overview of other lines (Engineering and Reinsurance)
- IV. Comprehensive Written Examination (Part I and II)

COURSE FEE (EXCLUDING VAT):

IIAP Member: P3,500

IIAP Alumni: P4,000

For All Others: P4,500

COURSE TITLE: Basic Life Insurance Course

WEBINAR SCHEDULE: May 10-24, 2021 (9AM to 12NN; Monday to Friday)

NO. OF SESSIONS: 10

COURSE OBJECTIVE: This course will provide an introduction to the basic concepts and principles of Insurance and the features of basic life products. This serves as a pre-licensing course for life insurance agents in lieu of taking and passing the pre-licensing examination of the Insurance Commission.

WHO SHOULD ATTEND: This course is a must for all who deal with life Insurance products either as a buyer or a seller. It is also designed for new employees and agents of life insurance companies, brokerage houses, adjustment companies, insurance agencies and bank employees who are assigned to insurance departments. It is also recommended for those who want to start or pursue a career in insurance. It serves as a refresher course for those already working in insurance that need to be updated on the current provisions and new products.

SESSION OUTLINE:

- I. Services of Life Insurance
 - Life Insurance Programming
 - Business Life Insurance
 - Estate Planning
- II. Types of Policies
- III. Salary Savings
 - Group Insurance
 - Non-Medical Insurance
- IV. Insurance Law
 - Requirements & Functions- Insurance Agent
 - Functions of the Insurance
- V. General Policy Provisions
 - Non-Forfeiture Provisions
 - Optional Settlement Provisions
- VI. Riders
 - Liens
 - Annuities
- VII. Premium Rate Determination
- VIII. Actuary's Function
 - Risk Selection
 - Underwriting
 - Rating
- IX. Reinsurance
- X. Review and Comprehensive Examination

COURSE FEE (EXCLUDING VAT):

IIAP Member: P9,500

IIAP Alumni: P10,000

For All Others: P10,500

COURSE TITLE: Life Insurance Operations and Management Course (LIOM)

WEBINAR SCHEDULE: October 4-15, 2021 (9:00AM to 12:00NN; Monday to Friday)

NO. OF SESSIONS: 10

COURSE OBJECTIVE: This course shall enable the participants to learn the “whys” of the processes in a life insurance company while recognizing that the “hows” may vary from company. The learnings imparted in the modules shall encourage them to do more critical thinking in their jobs and enable them to assess if something needs to be tweaked as opposed to merely following procedures.

WHO SHOULD ATTEND: This course was designed for a Life Insurance Practitioner who wants to become an Operations Generalist. Ideally, the participant must be fairly familiar with life insurance principles and product features.

SESSION OUTLINE:

I. Overview of the Insurance Operations

II. The Underwriting Function

- Individual Life
 - Application Form
 - Non-Medical Underwriting
 - Medical Underwriting
 - Financial Underwriting
 - Reinstatement Underwriting

III. Group Life Underwriting

IV. The Policyowner’s Service and Administration Function

- Customer Service
 - Policy Loans
 - Contractual and Non-contractual Policy Changes
- Reinstatements
- Billing and Collection, Premium Payment Handling
 - Grace Period, Extended Grace Period
 - Agency Audits and Controls
 - Unremitted Premium Collections
 - Conservation
 - Customer Interaction

V. Claims Handling and Claims Management

- Death Claims
 - Philippine Mortality Trends
 - Basic Claims Processing and Requirements (Individual/Group)
 - Investigation and the use of Inspection Agencies
 - Fraud Detection
- Living Benefits-Health Claims and Maturities
- Claims Monitoring (Claims Outstanding, IBNR, Claims Statistics)

VI. Legal Aspects of Life Insurance Operations

- To focus on legal issues arising from:
Underwriting (e.g. Privacy, Use of Additional Contract Endorsements, Exclusions)
- Policyowners Service (e.g. Assignments, Loan Forms, Automatic Premium Loan)
- Claims (e.g. Revocable Beneficiary/Irrevocable Designations, Beneficiary Disputes)
- Insurance Code Provisions , Recent IC Circulars/Rulings/Decisions

VII. Agency Administration and Support

- Agency Organization
- Agency Compensation and Impact on Agency Behavior
- Agency Records Maintenance
- Agency Accounting
- Admin Staff Interaction with the Agency Force

VIII. Financial Management

- Financial Statements
How Insurance Impacts the numbers
- Product Pricing and its implications on operations

IX. Leadership and Insurance Operations Manager

X. Comprehensive Examination

COURSE FEE (EXCLUDING VAT):

IIAP Member: P9,500

IIAP Alumni: P10,000

or All Others: P10,500

COURSE TITLE: Principles and Practice of Non-Life Insurance Accounting

WEBINAR SCHEDULE: July 5-15, 2021 (1:00-4:00PM; Mon. to Fri.)

NO. OF SESSIONS: 9

COURSE OBJECTIVE: To enable the participants to acquire the skills to account for non-life insurance transactions properly.

WHO SHOULD ATTEND: All nonlife insurance and reinsurance accountants and non-life insurance auditors.

SESSION OUTLINE:

I. Review of Non-Life Accounting Principles

II. The Annual Statement

- Preparation
- Presentation and Interpretation
- Ratio
- Manual for Examination/ Verification of Annual Statement

III. Statutory Provisions of the Insurance Code

IV. International Accounting Standards

V. Work Process Flow– Non-Life Insurance Accounting

- Products
- Marketing
- Sales
- Reinsurance
- Collection
- Investment
- Claims
- Underwriting expenses
- Underwriting results
- General Expenses
- Net Income
- Balance sheet
- Financial Ratios and Analysis

VI. Basic Accounting Records

1. Production or Sales Register

- Direct or Non-agencies accounts (no commission)
- Agencies accounts (with commission)
- Brokers accounts (with commission)

2. Reinsurance Production Register

- Facultative accounts (binders)
- Treaty accounts (statement of account)
- Excess of loss accounts (statement of account)

3. Reinsurance Placements (cessions) Register)

- Facultative cessions
- Treaty cessions
- Excess of loss cover

4. Claim or Loss Register

5. Premium Receivables Register

6. Commissions Register

7. Insurance Taxes Register

VII. Problem solving cases for participants covering the complete non-life insurance Financials:

- production
- reinsurance
- taxes (DST, EVAT, LGT, etc.)
- commissions (overwriting, contingent profit com)
- net retention
- premiums reserves (statutory & 24th method)
- premiums earned (gross, net)
- claims and outstanding losses
- losses incurred (gross, net)
- financial ratios for non-life accounting
- Problem solving on various cases of underwriting results

VIII. Accounting Information for Management

IX. Statistical Aspects/Wrap-up /Review

COURSE FEE (EXCLUDING VAT):

IIAP Member: P9,000

IIAP Alumni: P9,500

For All Others: P10,000

COURSE TITLE: Principles and Practice of Life Insurance Accounting

WEBINAR SCHEDULE: October 12-22, 2021 (1:00-4:00PM; Monday to Friday)

NO. OF SESSIONS: 9

COURSE OBJECTIVE: To enable the participants to acquire the skills to account for life insurance transactions properly.

WHO SHOULD ATTEND: All life insurance and reinsurance accountants and life insurance auditors.

SESSION OUTLINE:

- I & II. Basic Life Accounting Principles
- III & IV. The Annual Statement
 - Structure
 - Presentation and Interpretation
 - Definition of Ratios
- V. Adjusting Entries/
Summary of Financial Statement
- VI. Financial Control
- VII. Life Insurance Reserves and Liabilities
- VIII. Tax Requirements
- IX. Statutory Provisions of the Insurance Code

COURSE FEE (EXCLUDING VAT):

IIAP Member: P9,000

IIAP Alumni: P9,500

For All Others: P10,000

COURSE TITLE: Reinsurance Accounting

WEBINAR SCHEDULE: November 8-12, 2021 (1:00-4:00PM; Monday to Friday)

NO. OF SESSIONS: 5

COURSE OBJECTIVE: To enable the participants to acquire the skills to account for reinsurance transactions properly.

WHO SHOULD ATTEND: All nonlife insurance and reinsurance accountants.

SESSION OUTLINE:

- I. Overview of Reinsurance
- II. Reinsurance Chart of Accounts
- III. Accounting Records and Documents
Simplified Flowchart
- IV. Manner of Canceling Treaties
Profit Commission
- V. Government Regulations

COURSE FEE (EXCLUDING VAT):

IIAP Member: P8,500

IIAP Alumni: P9,000

For All Others: P9,500

COURSE TITLE: Trainers Accreditation Course (TAC) for Life Insurance Companies

WEBINAR SCHEDULES: February 24, 2021 (9:00AM - 4:00PM; Wednesday)
July 22, 2021 (9:00AM - 4:00PM; Thursday)

NO. OF SESSION: 1 day

COURSE OBJECTIVE: Trainers Accreditation Course (TAC) is a course leading to the renewal of the Life Insurance Agents Course (LIAC) in the IIAP. Trainers who complete this course will be accredited by the IIAP to conduct the IIAP's LIAC within their company's premises.

WHO SHOULD ATTEND: Designated Trainers, Managers

Participants should be directly involved in their company's agents' training activities and must carry a company certification (from the Head of Training or HR, or EVP in the case of head trainers) that they have complied with any of the following requirements for accreditation:

- Completion of LOMA Course 280 (Principles of Insurance) or 290 (Insurance Administration);
- Certification course offered by LUTC, GAMA, RFP or any other similar organization;
- One Year Agency Trainer's experience;
- Must have passed the Insurance Agent's Examination (IC with a grade of 80%).

COURSE FEE (EXCLUDING VAT):

IIAP Member: P2, 500

For All Others: P3, 000

COURSE TITLE: Basic HMO (Health Maintenance Organization) Course

WEBINAR SCHEDULE: June 21-24, 2021 (9AM-12NN; Monday to Thursday)

NO. OF SESSIONS: 4

COURSE OBJECTIVE: This course aims to address the need for companies to have a better understanding of HMO and its services. It is also the first step towards pursuing a career as an Actuary for HMO.

WHO SHOULD ATTEND: Those who are interested in knowing more about HMO products and services, operations and regulations.

SESSION OUTLINE:

- I. Principles governing HMOs, Services provided by HMOs, Customer Care
- II. Operations of an HMO, Insurance Commission Regulations, Marketing of an HMO product
- III. HMO Underwriting, Pricing and Valuation
- IV. Comprehensive Examination

COURSE FEE (EXCLUDING VAT):

IIAP Member: P5,000

IIAP Alumni: P5,500

For All Others: P6,000

COURSE TITLE: Basic Microinsurance Course

WEBINAR SCHEDULE: March 23-26, 2021 (9:00AM to 12:00NN; Tuesday to Friday)

NO. OF SESSIONS: 4

COURSE OBJECTIVE: The Introduction to Microinsurance Course is a comprehensive workshop to develop key knowledge and skills needed for insurance companies to enter the low-income market in a manner valuable for clients and viable for providers. The course builds on the wealth of knowledge that the International Labour Organization's (ILO) Impact Insurance Facility has generated in its years of supporting innovation and research in microinsurance across 35 developing countries, as well as the experience of the Insurance Institute for Asia and the Pacific (IIAP) in building capacity in the Philippines and the ASEAN region.

WHO SHOULD ATTEND: Insurance practitioners, particularly middle and mid-senior managers who are tasked to explore, set up, or improve existing microinsurance programs in their organizations.

SESSION OUTLINE:

- I. Introduction to Microinsurance.
- II. Understanding the Microinsurance market.
- III. Designing valuable products for the low-income market.
- IV. Responsible insurance, consumer education and promotion.
- V. Workshop

COURSE FEE (EXCLUDING VAT):

IIAP Member: P5,000

IIAP Alumni: P5,500

For All Others: P6,000

COURSE TITLE: Corporate Governance

WEBINAR SCHEDULES : January 28, 2021 (9:00AM-4:00PM; Thursday)
November 18, 2021 (9:00AM-4:00PM; Thursday)

NO. OF SESSIONS: 1 day

COURSE OBJECTIVE: Successful completion of the seminar will enable the participant to:

- a) Understand the overall strategic planning process, identify what role he plays and how he can effectively help in implementing the changes
- b) Acquire the following core managerial skills:
 - Strategic thinking
 - Leadership and empowerment
 - Change management
 - Data analysis and decision-making
 - Using the balanced-scorecard

WHO SHOULD ATTEND: Presidents, Vice Presidents, Board of Directors, Middle Managers, and Functional Unit Heads, those who have had at least 3 years of management experience in a life, a non-life insurance company, health maintenance organization or pre-need company and are responsible for implementing strategic plans.

SESSION OUTLINE:

- Revised Code of Corporate Governance
- ASEAN Corporate Governance Scorecard
- SEC-IC Annual Corporate Governance Report
- Board Responsibilities; Board vs Mancom
- Financial Reporting and Audit
- Dealing with 3rd parties - suppliers, contractors, creditors, regulators, government
- Illegal Activities of Corporations/ Directors/Officers;
- Insider Trading
- Protection of Minority Shareholders
- Short Swing Transactions
- Liabilities of Directors
- Confidentiality
- Conflict of Interest
- Related Party Transactions
- Case Studies

SEMINAR FEE (EXCLUDING VAT):

IIAP Member: P5,000

IIAP Alumni: P5,500

For All Others: P6,000

COURSES IN PARTNERSHIP WITH WEALTH MANAGEMENT CENTER FOR COMMUNICATION AND RESEARCH INC.

iCERTIFIED WEALTH PLANNER (CWP™) - Webinar

The flagship program of Wealth Management Center is an 8-day course which aims to equip financial advisors with practice-based knowledge in the areas of Wealth Creation, Wealth Protection, and Wealth Conservation. Participants learn how to professionally and confidently answer clients' concerns on health finance and insurance planning, investment planning, and estate planning. The designations CWP® and CEPP™ are given to participants who successfully complete all requirements.

iCERTIFIED ESTATE PLANNER, PHILS. (CEPP™) - Webinar

CEPP™ is the 3-day Estate Planning component of CWP®. Here participants learn local laws that apply to succession and inheritance in the Philippines, the different tools used in estate planning, and how to manage the impact of estate taxation. The designation CEPP™ is given to participants who successfully complete all requirements.

For enrollment please email or call:

Wealth Management Center

c/o MR. FERNANDO VALDIVIA

Tel: +63 906 546 5530

Email: fernando.valdivia@wealthcenter.org

Website: wealthcenter.org

SPECIAL INSURANCE COURSES:

COURSE FEE (EXCLUDING VAT):

IIAP Member: P3,000

IIAP Alumni: P3,500

For All Others: P4,000

COURSE TITLE: Motor Claims

WEBINAR SCHEDULE: January 20, 2021; 9:00AM -12:00NN

COURSE OBJECTIVE: This course aims to provide an introduction to the preparation and investigation involved in Motor Claims

WHO SHOULD ATTEND: This short course is for Claims personnel of insurance companies, adjusting firms, insurance brokers, insurance agencies, big corporations and underwriting personnel of insurance companies

TOPIC OUTLINE:

- I. Motor Insurance Claims and Kinds of Motor Claims
- II. Section II-No Fault Indemnity
- III. Section III-Loss on Damage
- IV. Section IV-Excess Liability Insurance
- V. Adjustment of Motor Car Claims
- VI. Process of Adjustment
- VII. Determining Payability a Deniability of Motor Car Claims
- VIII. Essential Elements
- IX. Fundamentals Principles in the Adjustment of Motor Car Claims
- X. Documentation of Motor Car Claims

COURSE TITLE: Industrial All Risk

WEBINAR SCHEDULE: January 27, 2021; 9:00AM to 12:00NN

COURSE OBJECTIVE: This course aims to provide and equip participants the knowledge to insure any commercial or industrial business with adequate protection from unforeseen damages and losses whether directly or indirectly from any covered peril resulting to interruption of business.

WHO SHOULD ATTEND: This short course is for those insurance practitioners and other professionals who are interested in updating their knowledge and want a deeper understanding of the concepts, applications and practices of All Risks Insurance.

TOPIC OUTLINE:

- I. Difference between a Named Peril Policy and All Risks Policy
- II. Exclusions under All Risks Insurance
- III. Advantages and Disadvantages in securing an All Risks Policy from the standpoint of the Client
- IV. Advantages and Disadvantages of All Risks Policy from the point of view of an Underwriter

COURSE TITLE: Bond Claims

WEBINAR SCHEDULE: March 24, 2021; 9:00AM -12:00NN

COURSE OBJECTIVE: This course aims to provide an introduction to the principles and practices involved in surety bond claims.

WHO SHOULD ATTEND: This short course is for participants who want to specialize on the surety bond product. This course also serves as a refresher course for participants that need to be updated on the current provisions of the surety bond claims.

TOPIC OUTLINE:

- I. Definition
- II. When does a claim arise
- III. Consequences
- IV. Proper procedures in handling and treatment of bond claims
- V. Valid and fraudulent types of claim

COURSE TITLE: Personal Accident Claims

WEBINAR SCHEDULE: April 21, 2021; 9:00AM to 12:00NN

COURSE OBJECTIVE: This course aims to provide an introduction to the principles and practices involved in personal accident claims.

WHO SHOULD ATTEND: This short course is for those who want to specialize on the Personal Accident product. This course also serves as a refresher course for participants that need to be updated on the current provisions of the personal accident claims.

TOPIC OUTLINE:

- I. Claims Procedure
- II. Dismemberment/Disablement
- III. Medical Expense
- IV. Hospital Income Claims
- V. Travel Insurance Claims
- VI. Personal Accident Death Claim
- VII. Process Of Claims Adjustment
- VIII. Fraudulent Claims
- IX. Questionable Claims

COURSE TITLE: Engineering Claims

WEBINAR SCHEDULE: June 9, 2021; 9:00AM -12:00NN

COURSE OBJECTIVE: This course aims to provide the basic foundation for a sound training in engineering insurance claims.

WHO SHOULD ATTEND: This short course is addressed to all who would like to know about the Engineering Insurance Claims such as Claims Staff, In-house Adjusters, Public Adjusters and other insurance practitioners who may be interested in this topic.

TOPIC OUTLINE:

- I. Key Factors to Consider
- II. Normal Grounds for Denial
- III. Factors that Aid Settlement
- IV. Typical Adjustment Process for Engineering Insurance
- V. Insured's Role
- VI. Adjuster's Role
- VII. Intermediaries' Role
- VIII. Post Settlement

COURSE TITLE: Fire Claims

WEBINAR SCHEDULE: July 14, 2021; 9:00AM -12:00NN

COURSE OBJECTIVE: This seminar shall enable participant to have a better understanding of Fire Claims.

WHO SHOULD ATTEND: Employees who are working with Fire Underwriting or Claims, who would like to enhance their knowledge or anyone who simply would like to have an understanding of the Basic Fire Claims.

TOPIC OUTLINE:

- I. Basic Insurance Principles
- II. Characteristics of Insurance Contracts
- III. Analysis of Fire Insurance Policy
- IV. Applicable Endorsements, Clauses and Warranties
- V. Adjustment of Fire Insurance Claim
Investigation
 - The Insured; Property Covered; Insurable interest; Cause of Loss; Nature and Extent of Loss Evaluation; Establishing Value and Loss; Bldg. Stocks and other Personal property, M/E; Application of policy Limiting Condition; Determination of Policy Liability
- VI. Issues and Practical Problems

COURSE TITLE: Comprehensive General Liability

WEBINAR SCHEDULE: August 18, 2021; 9:00AM to 12:00NN

COURSE OBJECTIVE: This course aims to provide the basic foundation for a sound training in Comprehensive General Liability Insurance.

WHO SHOULD ATTEND: This seminar is addressed to all who would like to know the basics of Liability Insurance. This seminar also serves as a refresher for participants who need to be updated on the current provisions of the liability insurance line.

TOPIC OUTLINE:

- I. Owners, Landlords & Tenants Liability
- II. Manufacturers & Contractors Liability
- III. Completed Operations & Products Liability
- IV. Contractual Liability
- V. Owners' & Contractors "Protective Liability"
- VI. Comprehensive General Liability
- VII. Elevator Hazards
- VIII. Product Hazards
- IX. Completed Operations
- X. Independent Contractors
- XI. Basic Underwriting

COURSE TITLE: Sabotage and Terrorism

WEBINAR SCHEDULE: September 22, 2021; 9:00AM -12:00NN

COURSE OBJECTIVE: The course will focus on the insuring clause of the policy. The seven (7) perils as well as the exclusions and extensions, are enumerated, defined and differentiated.

WHO SHOULD ATTEND: Those who are seeking to acquire a working knowledge on other non-traditional products which they want to offer to large local and Multinational accounts. Those who have undergone seminars on Fire insurance under BNL, Intermediate Fire or Advanced Fire, are of advantage to attend.

TOPIC OUTLINE:

- I. Insuring Clause (S & T, Political Violence)
- II. Sum Insured/Declared Values
- III. Policy Limit (per occurrence/annual aggregate)
- IV. Extensions (e.g. .Debris Removal, Threat of Terrorism, Expediting Expense, Service Interruption, Civil and Military Authority, Professional Fees, Land Improvement Clause, Transmission, feeder or distribution lines owned and /or controlled by the Insured locate in the insured premises)
- V. Exclusion (Risk Excluded, Property Excluded)
- VI. Other Warranties & Clauses (Non-Vitiation Clause, Nominated Adjusters, Multiple Insured, Simultaneous Payment Clause, Assignment clause)
- VII. Laws and Jurisdiction
- VIII. Underwriting Information

COURSE TITLE: Fraud in Claims

WEBINAR SCHEDULE: October 20, 2021; 9:00AM to 12:00NN

COURSE OBJECTIVE: The course aims to provide participants with knowledge on how to deal with fraudulent Claims.

WHO SHOULD ATTEND: This seminar is for those who are currently working or will work in the Claims Department and those who would like to know more about fraudulent claims.

TOPIC OUTLINE:

- I. What is Fraud?
- II. Common types of fraud
- III. Fraud in Insurance
- IV. Who may commit fraud? How are they committed?
- V. Factors affecting occurrence of fraud
- VI. Statistical Highlight
- VII. Effects on the Insuring Public; Effects on the bottom line of Insurer
- VIII. How can it be detected?
- IX. How can it be minimized/prevented
- X. Regulatory/Insurer's Initiative

COURSE TITLE: Effective Collection Techniques

WEBINAR SCHEDULE: November 10, 2021; 9:00AM to 12:00NN

COURSE OBJECTIVE: The program is designed to help the participants achieve the following:

- Clear overview of collection work as art and science
- The impact of distressed accounts receivables in the company's financial condition
- The contribution of the collection team in the growth of the business
- Identification of various characteristics of debtor
- Basic collection techniques, strategies and tools
- Attributes of a good collection staff/agent

WHO SHOULD ATTEND: For those who are in the collection department or accounting staff.

TOPIC OUTLINE:

- I. Disciplines of Collection
- II. Problem/Delinquent Accounts
- III. Drivers of Collection
- IV. Common/ General Categories of Debtors
- V. Psyching up your debtor
- VI. Conventional Collection Procedures
- VII. Out-of-the-Box Approaches to Collection
- VIII. Gearing up for Collection
- IX. Collection via Tele-Con
- X. Collection Strategies & Techniques
- XI. Seven Habits of a Highly Effective Collector
- XII. Cardinal Rules in Collection

INSURANCE MANAGEMENT DEVELOPMENT SEMINAR/WORKSHOP

COURSE TITLE: Supervisory Development Workshop

WEBINAR SCHEDULE: February 22-26, 2021 (9:00AM to 12:00NN; M,T,W and F)

NO. OF SESSIONS: 4

COURSE OBJECTIVE: This course aims to equip participants with the necessary tools and techniques to enable them to take more responsibilities for managing work in their area and improve their personal ability to lead a group in pursuit of individual and corporate effectiveness.

WHO SHOULD ATTEND: This course is for recently promoted supervisors/managers or for the supervisor/manager who wishes to improve his/her managerial skills.

COURSE OUTLINE:

I.INTRODUCTION

- A. Acquaintance
- B. Participant's Expectations
- C. Seminar Objectives, Framework and Methodology

II. LEADERSHIP AND MANAGEMENT

- A. Technical Work VS. Management Work
- B. Management Functions and Activities
- C. Principles of Supervision – Management
- D. Supervision – Management VS. Doing

III.PLANNING

- A. Definition, Rationale and Need, Activities
- B. Job Clarity – Key Result Areas, Objective Setting
- C. Action Planning: Specific Objectives, Programming, Scheduling, Budgeting, Potential Problems
- D. Administering Policies and Procedures
- E. Summary of Planning & its Importance

IV.CONTROLLING

- A. Definition, Rationale and Need
- B. Activities
- C. Link to Planning
- D. Setting Standards of Performance
- E. Measuring and Evaluating Performance
- F. Correcting Performance and Performance Appraisal

V.ORGANIZING

- A. Definition, Rationale and Need
- B. Activities
 - 1. Definition/Differentiation
 - a. Organization Structure
 - b. Delegating Techniques & Degrees
 - c. Developing Relationships

VI. LEADING

- A. Definition, Rationale and Need

- B. Leadership
- C. Evaluating Self-Adaptability
- D. Decision Making
 - 1. Guidelines
 - 2. Exercise
- E. Communicating
 - 1. Definition and Nature
 - 2. Types
 - 3. Interpersonal Communication Theories/Models
 - 4. Barriers
 - 5. Guidelines for Giving/Receiving Feedback
 - 6. Guidelines for Active Listening
- F. Motivating
 - 1. Approaches
 - 2. Identifying Needs of Subordinates
 - 3. Role of Culture in Motivation
 - 4. Framework for Identifying Problems
- G. Selecting New Personnel
- H. Training Subordinates
 - 1. Rationale for On-the-Job Training
 - 2. Guidelines

SEMINAR FEE (EXCLUDING VAT):

IIAP Member: P5,000

IIAP Alumni: P5,500

For All Others: P6,000

COURSE TITLE: Customer Service Workshop

WEBINAR SCHEDULE: March 15-18, 2021 (9:00AM to 12:00NN; Monday to Thursday)

NO. OF SESSIONS: 4

COURSE OBJECTIVE: This workshop aims to help shift the employee's focus from just doing his job to a higher emphasis of ensuring that the customer in front of him receives the service he needs and wants, resulting in a positive experience with the company.

WHO SHOULD ATTEND: This workshop is for marketing & sales professionals, customer service representatives, receptionists and all employees who deal directly with customers.

COURSE OUTLINE:

- I. Introduction:
 - a. Service excellence: Why is it important now more than ever?
 - b. The customer service mindset: Do you have it?
 - c. Service and satisfaction
- II. Starting with the Customer
 - a. Who are your customers?
 - b. Customer expectations
 - c. Service dimensions customers expect
- III. The Customer Experience: Interacting with the Customer
 - a. Initial contact (approaching/welcoming the customer)
 - i. Proactive service
 - ii. First impressions, courtesy and the right attitude
 - iii. Building rapport
 - b. Collecting information through effective communication
 - i. Asking the right questions
 - ii. Active listening
 - c. Meeting the customer's needs (service delivery)
 - i. Giving the right service to different types of customers
 - ii. Discussing the features and benefits of your products/services
 - iii. Presenting alternatives
 - d. "Is there anything else?"
 - e. Ending the customer experience on a high note
 - f. Continuing service: staying in touch
- IV. Service Recovery: Managing Complaints and Complaining Customers
 - a. A positive take on complaints
 - b. Why do customers complain?
 - c. Steps to service recovery
- V. Telephone interaction
 - a. Tuning up your telephone etiquette
- VI. Personal Effectiveness
 - a. Verbal and non-verbal communication tips
 - b. Personal grooming
 - c. Building self- confidence
 - d. Good manners and etiquette

SEMINAR FEE (EXCLUDING VAT):

IIAP Member: P5,000

IIAP Alumni: P5,500

For All Others: P6,000

COURSE TITLE: Effective Business Correspondence

WEBINAR SCHEDULE: April 19-22, 2021 (9:00AM to 12:00NN; Monday to Thursday)

NO. OF SESSIONS: 4

COURSE OBJECTIVE: This course aims to enhance professional writing of participants to achieve high-impact results. It also aims to enable the participant to write concise, clear, cordial and courteous business correspondence using the basic principles of effective written messages.

WHO SHOULD ATTEND: This is for employees who prepare and edit business proposals, memos, and letters for their respective companies.

COURSE OUTLINE

- I. The Process of Communication
- II. Principles in Writing Effective Business Correspondence
 - The Six Cs of Writing
 - The Business Style- Tone, Outlook, Organization, Expressions Used
- III. Principles in Writing Effective Reports
- IV. Exercises on Unity
- V. Transitional Words and Phrases
- VI. Redundant Expressions
- VII. Eliminating Sexist Language
- VIII. Prepositions with Special Words
 - Minor Errors and other Pitfalls
 - Prepositions & Idiomatic Expressions
- IX. Business Correspondence – Letters and Memos
- X. Good News/Bad News/Neutral News Communications
- XI. Guidelines on Writing E-Mail
- XII. Trite and Outworn Expressions to Avoid
- XIII. Topic Development Strategies
- XIV. Business Letter Formats

SEMINAR FEE (EXCLUDING VAT):

IIAP Member: P5,000

IIAP Alumni: P5,500

For All Others: P6,000

COURSE TITLE: Basic Leadership Workshop

WEBINAR SCHEDULE: May 24-27, 2021 (9:00AM to 12:00NN; Monday to Thursday)

NO OF SESSIONS: 4

COURSE OBJECTIVE: This workshop aims to provide the participants with a learning experience that would enable them to assess, diagnose, improve or polish their leadership competencies and practices, given research-based leadership concepts, competencies and effective practices.

WHO SHOULD ATTEND: This workshop is for managers and supervisors and other individuals who manage and will manage people.

COURSE OUTLINE:

- I. Introductory Module
- II. Leadership vis-a-vis Management
 - a. Leadership Capability vs. Managerial Capability
 - b. Diagnostic Exercise: LP1 Diagnostic Instrument
 - c. Five Exemplary Practices of Effective Leaders (Posner and Kouzes)
- III. Developing Interactive and Personal Leadership Skills
 - a. Diagnosing and analyzing interpersonal transactions in organizations
 - b. Behavioral dynamics of a key leadership skill and capability – interpersonal communication
 - c. Attitudinal dimensions of leadership behavior
 - d. Action planning for personal development
- IV. Dynamics of communication in groups/teams
 - a. GD Exercise 1: Puzzle Exercise
 - b. GD Exercise 2: Building Trust
 - Group Dynamics Format
 1. GD Administration
 2. Analysis of process
 3. Insights and learnings
 4. Integration/Lecturette
- V. Motivation and Influencing Skills and Styles
 - a. Motivational Analysis of Organizational Behavior
 1. Instrumentation
 2. Scoring and Processing
 3. Analysis and Insights
 4. Integration/Lecturette
 - b. My Personal Best Exercise
 - c. Summary and Integration

SEMINAR FEE (EXCLUDING VAT):

IIAP Member: P5,000

IIAP Alumni: P5,500

For All Others: P6,000

COURSE TITLE: Improving Grammar in Business Writing

WEBINAR SCHEDULE: June 21-24, 2021 (9:00AM to 12:00NN; Monday to Thursday)

NO. OF SESSIONS: 4

COURSE OBJECTIVE: Every participant of this Course is expected to review the Basic English Grammar rules toward effective business communication; to acquire new strategies / techniques to change inefficient communication habits; to become aware of the strong impact on the use of accurate grammar in various contexts of situations and to further develop and refine grammatical skills to ensure effective communication.

WHO SHOULD ATTEND: Employees who want to improve and further develop their grammar and writing skills.

COURSE OUTLINE

- I. Getting Acquainted
- II. Overview of The Course
- III. Importance of Effective Communication
- IV. The Process of Communication
- V. Barriers to Effective Communication
- VI. Basic Business Grammar And Strategies Applied In Workshops
 - A. Subject-Verb Agreement
 - B. Verb Tenses
 - C. Modifiers: Misplaced, Dangling and Degrees of Comparison
 - D. Prepositions: Location, Dates, Idiomatic Expressions
 - E. Nouns and their Plural Forms
 - F. Sentence Structures
- VII. Integrating Activity: Writing a Composition on a Given Business Situation.

SEMINAR FEE (EXCLUDING VAT):

IIAP Member: P5,000

IIAP Alumni: P5,500

For All Others: P6,000

COURSE TITLE: Accounting for Non-Accountants

SCHEDULE: July 26-29, 2021 (9:00AM to 12:00NN; Wednesday to Friday)

NO. OF SESSIONS: 4

COURSE OBJECTIVE: To gain an understanding of the basic accounting concepts, procedures and processes in a simple and practical way. To be able to learn actual applications of said concepts, procedures and processes. To be able to appreciate and know the importance of the financial accounting reports and information for a better decision making. This course aims to equip non-accountants with the basic understanding of the financial statements (Balance Sheet, Income Statement and Cash flow), financial ratios and analysis for management information.

WHO SHOULD ATTEND: This course is designed for insurance supervisors, managers and executives whose functions and responsibilities may require basic knowledge on how business transactions are recorded in the books and subsidiaries, and then summarized into the financial statements. Staff involved in any of the following, outside of Accounting: Sales, Underwriting, Delivery, and Purchasing/ Procurement, Inventory, Human relations / Personnel.

COURSE OUTLINE

- I. Financial Statements, understanding the basic principles of:
 - a. Balance Sheet
 - b. Income Statement
 - c. Cash Flow Statement
- II. Business Transactions, basis for recording
 - a. Transactions analysis
 - b. Creation of Accounts
 - c. Double-entry accounting
 - d. Recording transactions
 - e. Books of Accounts and subsidiaries
 - e. Summarizing the entries
 - f. Preparation and understanding trial balance
- III. Basic Accounting Principles/ Documents/ Closing
 - a. Cash Accounting
 - b. Accrual Accounting
 - c. Matching principle,
 - d. Accounting Period
 - e. Transaction documents
 - f. Correction/adjustment method (current/prior yr.)
 - g. Financial Statement, Schedules and Notes.
 - h. Closing the books.
- IV. Financial Ratios and Analysis
 - a. Vertical/Horizontal comparative
 - b. Computation and interpretation of financial Ratios for management info and other users of Financial Statement

SEMINAR FEE (EXCLUDING VAT):

IIAP Member: P5,000

IIAP Alumni: P5,500

For All Others: P6,000

COURSE TITLE: People Management

SCHEDULE: August 23-26, 2021 (9:00AM to 12:00NN; Wednesday to Friday)

NO. OF SESSIONS: 4

COURSE OBJECTIVE: The objective of the course is to impart skills in handling and partnering with people.

WHO SHOULD ATTEND: This course is for managers, supervisors and those who want to develop their people handling skills.

COURSE OUTLINE:

I. Management, Leadership and Empowerment

A. Management

1. Definition / Functions
2. Management vs. Technical Work
3. Three –Step Logic for Managers

B. Leadership

1. Description
2. Comparison between Management and Leadership
3. Cultural Approaches to Leadership (J. Landa Jocano)

C. Empowerment

1. Definition / Factors for Empowerment
2. Effects of Empowerment
3. Phrases of Empowerment

II. Influencing Styles of Leadership

1. Kinds of Influencing Styles
2. Comparison of Styles
3. Self – Assessment: Knowing Your Influencing Styles

III. Establishing Positive Human Relations

A. Managing the Boss

1. Understanding your Superior
2. Understanding Yourself
3. Take action

B. Maintaining Harmony with Peers

C. Influencing Different Subordinates

1. Managerial Grid

- Kinds of Managers
- Behavior of Different Managers
- Reactions of Subordinates to Managerial Styles
- Self – Assessment: What is your style?

2. Situational Leadership

- Adaptive Leader Behavior
- Powers of Leaders
- References of Maturing Level and Styles
- Maturity and Power
- Self – Evaluation: Leadership Style and Adaptability

SEMINAR FEE (EXCLUDING VAT):

IIAP Member: P5,000

IIAP Alumni: P5,500

For All Others: P6,000

COURSE TITLE: Sales and Negotiation Workshop

WEBINAR SCHEDULE: September 27-30, 2021 (9:00AM to 12:00NN; Monday to Thursday)

NO. OF SESSIONS: 4

COURSE OBJECTIVE:

At the end of the course participants will be able to:

1. Learn the critical components of an effective selling / buying relationship
2. Define and describe decision-maker priorities
3. Identify strategies to overcome reluctance to gain commitment
4. Define negotiation opportunities and attitudes
5. Use techniques needed for negotiations to work smoothly

WHO SHOULD ATTEND: This workshop is for marketing & sales professionals, customer service representatives, and all employees who deal directly with the clients.

COURSE OUTLINE:

- I. What is Selling?
- II. Getting the right start: Prospecting
- III. Buying and Selling Process
- IV. Establishing and Developing Relationships
- V. Preparing for the sales call
- VI. Uncovering Priorities
- VII. Communicating and Reinforcing Benefits
- VIII. Getting and Reacting to feedback
- IX. Securing and Commitment
- X. Negotiating

IIAP Member: P5,000

IIAP Alumni: P5,500

For All Others: P6,000

OTHER COURSES OFFERED ONLY FOR IN-HOUSE TRAININGS

IIAP is also exclusive trainings for all courses and seminars and for the following courses below. We can provide a tailored training/workshop to suit the needs of your organization.

Date /schedule can be negotiated; minimum number of participants is 25 for Life and Non-Life Courses and 20 for Management Courses/Special Seminars. Exclusive training package rate is available upon request.

COURSE

1. Motor Claims, Damage Analysis and Estimating Seminar
2. Risk Management Seminar
3. Basic Variable Life Insurance Course
4. Basic Life Reinsurance Course
5. Management Science
6. Basic Operations Management
7. Performance Management
8. Coaching & Counseling
9. Management Dynamics
10. Integrated Planning and Controlling Techniques
11. Change Management
12. Basic Project Management
13. Basic Treasury Management
14. Business Ethics
15. Upgrade your Selling Skills
16. Basic Economics
17. Managerial Statistics
18. Corporate Entrepreneurship
19. Basic Market Research
20. Supply Chain Management
21. IT for Managers
22. Lean Management

COURSE ADMISSION

All IIAP webinars are via ZOOM. Enrolled participants must download the ZOOM application in their laptops, tablets and/or mobile phones.

Admission to the course will be limited to allow maximum interaction among the participants. Reservations will be given only to those who have submitted their applications and paid the corresponding seminar fee.

An applicant must fully fill-out the IIAP admission form (see last page), attach an ID-sized picture thereon and submit the same a week before the start of the seminar. Refund shall not be allowed after the start of the seminar.

CERTIFICATE

A Certificate of Completion shall be awarded to participants who obtain a rating of seventy percent (70%) or better for the examinations and attended at least eighty percent (80%) of the sessions. A rating sheet will also be given indicating the final grade of the examinee. A Certificate of Attendance shall be awarded to those who attended at least eighty percent (80%) of the sessions and to those who take the exam but failed.

SEMINAR FEE AND CANCELLATION NOTICE

The seminar fee covers the cost of registration, e-copy of materials and other miscellaneous expenses. Payments for registration fee can be in check, payable to the Insurance Institute for Asia and the Pacific, Inc. We also accept bank transfer transactions. Fees should be remitted on or a week before the seminar.

All cancellations and substitutions must be sent in writing to IIAP. Due to the costs incurred for preparation and administration, any cancellations received a day before and onwards are subject to penalty.

INQUIRIES AND RESERVATIONS

For more information, please email or call:

INSURANCE INSTITUTE FOR ASIA AND THE PACIFIC, INC.

c/o Education Department

Address: 26th Floor, BPI-Philam Life Makati (formerly Ayala Life-FGU Center),
6811 Ayala Avenue, Salcedo Village Bel-Air, Makati City, Philippines
Tel Nos: (632) 8887-7444 to 46; 8813-0169; 7753-1488 TeleFax: (632) 8887-7443
Email: education@iiap.com.ph
Website: www.insuranceinstituteasiapacific.com
Facebook: Insurance Institute for Asia and Pacific, Inc.

RECOMMENDED TRAINING ROAD MAP

BY EMPLOYEE LEVEL

I. NEW EMPLOYEES

- 1 Basic Non-Life Insurance Course
- 2 Effective Business Correspondence
- 3 Improving Grammar in Business Writing

II. STAFF

- 1 Basic Non-Life Insurance Course
- 2 Basic Leadership Workshop
- 3 Insurance Claims
- 4 Fraud in Claims

III. FOR PROMOTION TO SUPERVISORY /MANAGER POSITION OR NEW SUPERVISORS/MANAGERS

- 1 People Management
- 2 Basic Leadership Workshop
- 3 Supervisory Development Workshop
- 4 Effective Collection Techniques and Strategies
- 5 Accounting for Non-Accountants
- 6 Effective Negotiation Techniques
- 7 Customer Service Workshop
- 9 Sales and Negotiation Workshop

IV. SENIOR MANAGERS/EXECUTIVES

- 1 Enterprise Wide Risk Management
- 2 Strategic Management
- 3 Business Continuity Planning
- 4 Corporate Governance

V. FIRE UNDERWRITERS TRACK

- 1 Basic Non-Life Insurance Course
- 2 Intermediate Course on Fire (Property) Insurance
- 3 Advanced Course on Fire (Property) Insurance
- 4 Advanced Course on Engineering Insurance
- 5 Condominium Insurance
- 6 Business Interruption Course
- 7 Fire Claims
- 8 Engineering Claims
- 9 Industrial All Risks Insurance
- 10 Sabotage and Terrorism

- VI **MOTOR UNDERWRITERS TRACK**
 - 1 Basic Non-Life Insurance Course
 - 2 Advanced Course on Motor Insurance
 - 3 Motor Claims
 - 4 Basic Modern Motor Vehicle Systems & Collision Damage Repair Estimating

- VII **MARINE UNDERWRITERS TRACK**
 - 1 Basic Non-Life Insurance Course
 - 2 Intermediate Course on Marine Insurance
 - 3 Advanced Course on Marine Insurance
 - 4 Marine Claims

- VII **SURETY UNDERWRITERS TRACK**
 - 1 Basic Non-Life Insurance Course
 - 2 Advanced Course on Suretyship
 - 3 Surety Claims

- IX **CASUALTY UNDERWRITERS TRACK**
 - 1 Basic Non-Life Insurance Course
 - 2 Intermediate Course on Casualty Insurance
 - 3 Advanced Course on Miscellaneous Casualty
 - 4 Comprehensive General Liability Insurance
 - 5 Miscellaneous Casualty Insurance Claims

- X **REINSURANCE TECHNICAL STAFF TRACK**
 - 1 Basic Non-Life Insurance Course
 - 2 Intermediate Course on Reinsurance
 - 3 Advanced Course on Reinsurance
 - 4 Reinsurance Accounting

- XI **INSURANCE ACCOUNTANT TRACK**
 - 1 Basic Non-Life Insurance Course
 - 2 Principles and Practice of Non-Life Accounting
 - 3 Setting Up a Tax Qualified Retirement Plan

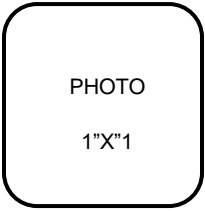
- XII **ACCIDENT AND HEALTH UNDERWRITERS TRACK**
 - 1 Basic Non-Life Insurance Course
 - 2 Personal Accident Claims
 - 3 Advanced Course on Accident and Health Insurance

- XII **LOSS ADJUSTERS TRACK**
 - 1 Basic Non-Life Insurance Course
 - 2 Advanced Course on Loss Adjustment
 - 3 Claims Technician Course



IIAP APPLICATION FOR ADMISSION

This form is for IIAP record only



Date of Application			
Seminar/Course Title		Inclusive Date/s	
(Family Name) Name)		(First Name)	(Middle)
Company Name			Citizenship
Designation		Email Address	
Business Address			Office Tel No.
Mailing Address			Contact Nos.
Residence/Mobile No:			
Age	Sex	Date of Birth (mm/dd/yyyy)	Civil Status (Please check appropriate box)
			<input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Widowed <input type="checkbox"/> Separated
Highest Educational Attainment (Course/Degree):			
Name of School/University:			
Sponsored By:(Please check appropriate box)			
<input type="checkbox"/> Company _____ <input type="checkbox"/> Self <input type="checkbox"/> Others, please specify _____			
Signature of Applicant			
Signature of Endorsing Officer over Printed Name			
Designation of Endorsing Officer/Company			