

# WSIA EDUCATION PROGRAMS

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## EXCESS & SURPLUS LINES

**\$1,260**

JUNE 2-5, 2019 • ST. LOUIS, MO

*For all insurance professionals who are relatively new to the surplus lines industry or who have recently transitioned into E&S*

Attendees gain solid understanding of the surplus lines marketplace, current issues and trends, and the roles of brokers, underwriters, program administrators, managing general agents and other players in the industry. At the end of the program, participants will be more knowledgeable about the surplus lines market.

## UNDERWRITING BOOT CAMP

**\$925**

JULY 15-18, 2019 • ATLANTA, GA

*For insurance professionals new to or with limited surplus lines underwriting exposure or experience*

Designed for underwriters, brokers and those with binding authority to establish an underwriting foundation to enhance participants' abilities to more quickly and effectively accomplish their work. With classroom facilitation, discussion and thorough case studies, participants will be more effective technicians at the end of the program.

## CONSULTATIVE SELLING AND NEGOTIATIONS

**\$1,045**

MARCH 12-13, 2019 • STAMFORD, CT | JULY 9-10, 2019 • DALLAS, TX | NOVEMBER 12-13, 2019 • SCOTTSDALE, AZ

*For all brokers, managing general agents and underwriters who transact business and have relationships with clients*

This customized surplus lines training produced by Richardson, a global sales training company, strengthens selling and negotiation skills. A small group setting allows an individualized experience focused on developing relationship skills. Participants will leave the program with stronger sales and negotiation skills, leading to greater success.

## MARCUS PAYNE ADVANCED E&S

**\$1,300**

NOVEMBER 3-6, 2019 • ST. LOUIS, MO

*For E&S professionals with multiple years of surplus lines industry experience*

Attendees learn about wholesale distribution issues and best practices, industry regulatory issues, marketing, the claims process and the reinsurance impact upon the wholesale, specialty and surplus lines industry from professionals who bring years of expertise. Participants will gain comprehensive knowledge of a company's operations, armed with information that can be applied immediately to strengthen the individual's contribution to the business.

## EFFECTIVE COACHING

**\$1,045**

MARCH 11, 2019 • STAMFORD, CT | NOVEMBER 11, 2019 • SCOTTSDALE, AZ

*For any surplus lines manager who leads a team of professionals responsible for revenue or premium production*

During this one-day program, participants receive customized training produced by Richardson geared towards leading teams and enhancing performance in the wholesale, specialty and surplus lines industry and return to their office with knowledge and techniques designed to bring out the best in teams.

## SURPLUS LINES MANAGEMENT

**\$2,100**

FEBRUARY 4-7, 2019 • ATLANTA, GA

*For any broker, managing general agent or underwriter who manages a team and book of business or is transitioning into a leadership role*

This program is taught in partnership with faculty from Emory University's Goizueta School of Business as well as WSIA senior leaders and industry CEOs. Combining industry knowledge and world-class management training, the instructors and curriculum prepare participants for their current and future leadership positions by examining the foundation of good management. Participants will learn to harness their own leadership style to motivate teams, manage conflict, build a book of business and increase company value and performance.

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## WSIA UNIVERSITY

**\$175/4-HOUR COURSE**

AUGUST 14-16, 2019 • SCOTTSDALE, AZ

*For E&S professionals at all career levels and job responsibilities to grow their industry expertise*

For this two-day education program, attendees choose from a variety of technical training sessions and workshops to customize their learning experience. Some courses are case study-based, some are panel discussions, and others are presentations with class engagement to enhance technical skillsets.

## EXECUTIVE LEADERSHIP SUMMIT

**\$2,625**

APRIL 30 - MAY 3, 2019 • WASHINGTON, D.C.

*For surplus lines senior-level executives with considerable experience and direct responsibility for obtaining superior and sustainable results*

Senior-level E&S industry members participate in this capstone course at the University of Virginia's Darden School of Business in Washington, D.C. The program curriculum emphasizes transitioning from a tactical leadership approach to a strategic leadership focus. This program will challenge the way the participant thinks, leads and manages in today's complex environment, enabling you to lead more successfully.

### ONLINE COURSES

#### SURPLUS LINES FUNDAMENTALS

**\$15 - \$16.25**

*For insurance professionals seeking an introduction to E&S*

Online participants understand why the surplus lines market is needed, how its distribution system works, how surplus lines transactions are regulated and how the surplus lines market is able to successfully underwrite risks that the standard market has declined.

#### SURPLUS LINES REGULATORY COMPLIANCE

**\$7 - \$14.95**

*For insurance professionals seeking an introduction to regulatory compliance*

This online course covers a variety of subject material including an overview of the surplus lines industry, licensing, record keeping, insurer eligibility, diligent search, tax remittance, policy disclosure and delivery and independent procurement and industrial exemption.

## WSIA TECHNICAL & CAREER DEVELOPMENT

<b>ONLINE COURSES</b>	<b>Surplus Lines Regulatory Compliance</b> For insurance professionals seeking an introduction to regulatory compliance	<b>Underwriting Boot Camp</b> For underwriters with single-line experience or employees in a technical role seeking to move into an underwriting role in the future	<b>Marcus Payne Advanced E&amp;S</b> For E&S professionals with 5-15 years of insurance experience to strengthen their surplus lines knowledge	<b>Surplus Lines Management</b> For professionals transitioning into leading teams while still responsible for their own book of business <i>Offered at Emory University's Goizueta School of Business in Atlanta, GA</i>	<b>WSIA University</b> Designed to improve technical underwriting competency and develop networking relationships with peers
	<b>Surplus Lines Fundamentals</b> For insurance professionals seeking an introduction to E&S				
..... INTRODUCTORY ..... INTERMEDIATE ..... EXPERIENCED .....					
	<b>Excess &amp; Surplus Lines</b> For professionals early in their careers to gain understanding of broker/carrier relationships and how surplus lines works in the marketplace	<b>Consultative Selling and Negotiations</b> For any surplus lines professional who transacts business and has relationships with clients	<b>Effective Coaching</b> For surplus lines professionals responsible for a team to receive customized sales coaching training	<b>Executive Leadership Summit</b> For E&S senior-level professionals developing and implementing strategic planning, leadership and management change <i>Offered at University of Virginia's Darden School of Business in Washington, D.C. area</i>	<b>ALL LEVELS</b>

For more detailed information about all WSIA education programs, visit [www.wsia.org](http://www.wsia.org).