



# CPA & James K. Ruble Seminars

## What CPAs need to know about James K. Ruble Seminars:

### Program Content and Learning Objectives

James K. Ruble Seminars were created for CICs and CRMs in response to their advanced, specific, education needs. These seminars encompass a wide variety of specialty topics. Many Ruble Seminars offer the special feature of concurrent sessions, enabling participants to select topics of their choice during the seminar.

The **Advanced Risk Management Seminar** was developed to give CRMs and CICs the opportunity to take their risk management education to a higher level.

**Agency Management Practices Seminar** enhances and develops abilities for managing all aspects of the agency business. It is recommended that participants have a basic knowledge of agency financial management and agency operations.

**Contractors Seminar** reviews the complex insurance issues, requirements, and identification process of risks for contractors and subcontractors. Learn to analyze construction contracts and match coverages to exposures.

**Executive Risk Seminar** is devoted to the exposures, insurance coverages, and risk management techniques for handling the specific risks faced by executives.

At the **Financial Institutions Seminar** you will learn the intricacies of insuring financial institutions and expand your capabilities as a consultant, specifically for those organizations with up to \$500 million in assets.

**Graduate Seminars** include a variety of topic selections along with real-life applications for the material. Choices may include marketing, sales, and sales management subjects in addition to advanced property and casualty and life and health topics.

**Healthcare Providers Seminar** is designed for risk managers, producers, agency owners, and company personnel who are responsible for protecting the property and casualty loss exposures that medical professionals, hospitals, clinics, and/or long-term care facilities face.

**Large Commercial Seminar** focuses on the risk management and insurance for accounts with premiums ranging from \$250,000 to \$2.5 million, analyzing the unique risks for the client and a challenge for the agent, risk manager, or company employee. Learn alternative risk handling techniques in both property and casualty areas.

The **Legal Concepts Seminar** provides perspective and important information on the legal issues that affect your clients and your agency.

**Managing People Seminar** is a practical seminar that will help build skills to improve human resource strategies and develop a leadership style to move the agency forward.

The **Marketing & Sales Seminar** is an excellent training ground for sales managers and producers responsible for agency marketing strategies and those whose goals are to improve the sales results of their agencies.

**MEGA and Multiple Topics Seminars** allow the participant to create their own seminar by choosing from topics that include newly revised and advanced property and casualty coverages, life and health, risk management, management/sales or agency management subjects, and advanced industry-specific presentations. The MEGA is a five-day program and Multiple Topic is a two and a half-day program.

The **Small Commercial Seminar** will help participants stay current and profitable in the rapidly expanding market of small commercial accounts. As small business enterprises grow in number, so do the opportunities for insurance organizations.

The **Truckers Seminars** provide current information on trends, markets, and regulations in the trucking industry, including the coverage forms specific to the Trucking and Motor Carrier industry. **Truckers II** includes an in-depth study utilizing guest faculty from specific motor carrier industry organizations.

### Program Level and Type of Delivery

The content of James K. Ruble Seminars is advanced. Each of these seminars is very specialized and enhances a designee's level of knowledge about an advanced topic. Group-live lecture with visual aids accompanying.

### Prerequisites, Advance Preparation, and Program Registration Requirements

To attend a Ruble Seminar, a participant must be a designated, dues-paid Certified Insurance Counselor (CIC) or Certified Risk Manager (CRM). No advance preparation is required. Photo ID is required at check-in.

### Amount of CPE Credit

20 hours

### Refund Policy and Complaint Resolution Policy

Cancellations received within 7 calendar days of a program will incur a \$75 fee. If you do not cancel and do not attend the program, you will incur a \$125 fee. The balance of the registration fee may be refunded or transferred to another course. You may substitute an eligible person for the same event anytime at no charge with notification prior to the course. For more information regarding administrative policies such as a complaint and refund, please contact our office at 800-633-2165.

### Official National Registry of CPE Sponsor statement

The National Alliance for Insurance Education & Research is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be addressed to the National Registry of CPE Sponsors, 150 Fourth Avenue North, Suite 700, Nashville, TN, 37219-2417. Website: [www.nasba.org](http://www.nasba.org).