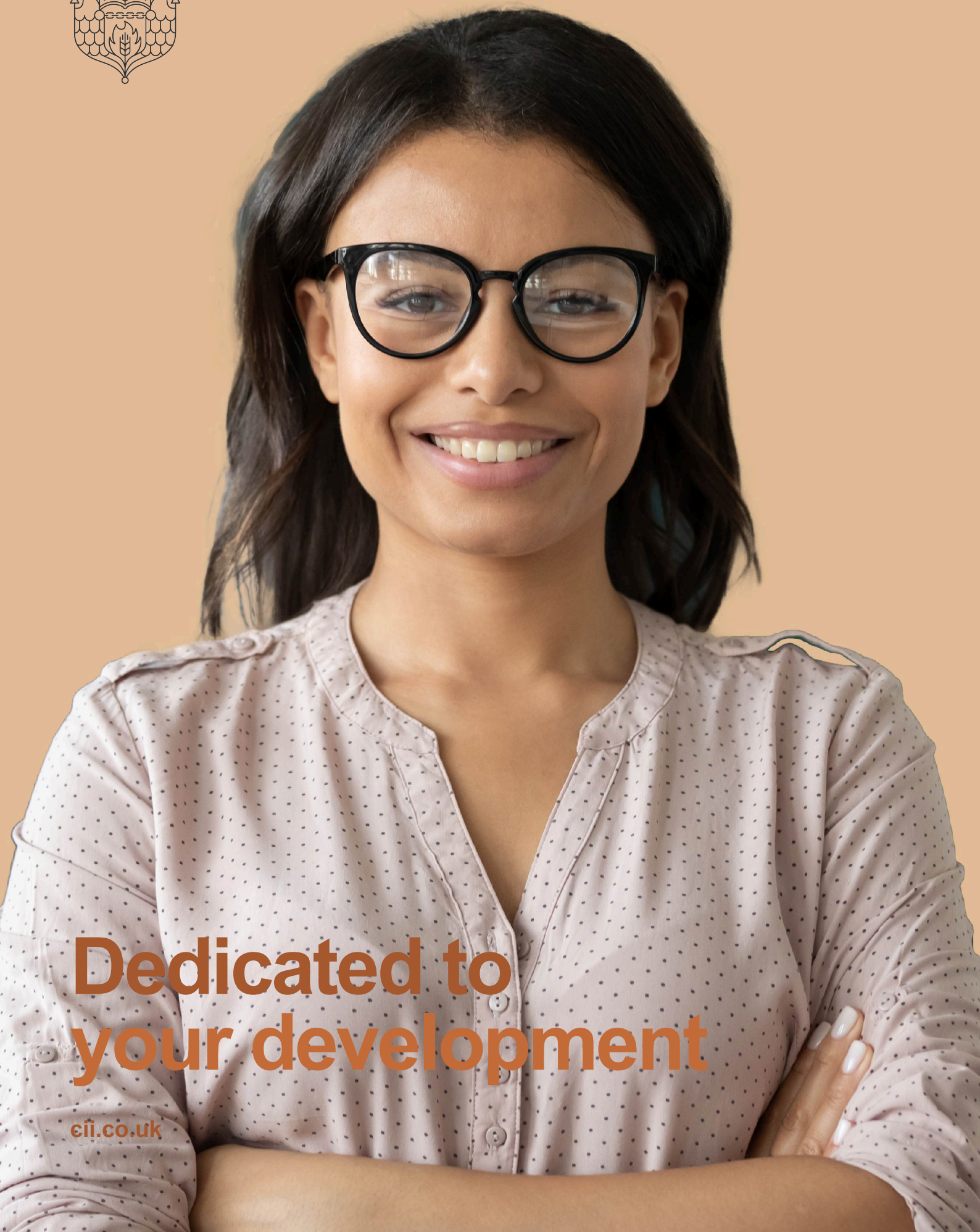




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Insurance  
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2024 Training catalogue



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## About us

The Chartered Insurance Institute (CII) is a professional body dedicated to building public trust in the insurance and personal finance professions. Over 122,000 members commit to high professional standards and continuing professional development.

We work with businesses to develop bespoke, company-wide solutions that ensure competitive advantage by enhancing employees' technical and professional competence.

Success in CII qualifications is universally recognised as evidence of knowledge and technical expertise.

Our members are able to drive personal development and maintain their professional standing by adhering to our Code of Ethics and by accessing a range of learning services.

Find out more at: [cii.co.uk](http://cii.co.uk)

## Our vision

Our vision is to build public trust across the insurance and personal finance professions by providing relevant learning, insightful leadership and an engaged membership. Driving professional standards is at the heart of everything we do. Ethical conduct and technical competence are supported by our Code of Ethics and qualifications, designed in conjunction with sector practitioners and registered with Ofqual in the Regulated Qualifications Framework.



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# CII training: helping you stay ahead of the curve!

As part of our work to develop professional standards in our sector, the CII provides a comprehensive range of training and development solutions. We offer courses to employers and individuals covering exam revision, technical training and business and leadership topics.

Exam revision training can really help candidates identify areas to focus on, address areas of confusion or weakness and build confidence ahead of the exam itself. We can offer revision support across all our units and qualifications through our network of highly-qualified subject experts.

Our technical training is designed to ensure delegates have the knowledge needed to stay sharp in their chosen areas of expertise, or can add valuable expertise to aid career development. Our expert training team are highly skilled and experienced in their areas of specialism and can offer training at all levels.

We also have a growing offering of business and leadership topics intended to ensure our members and customers have access to high quality personal and professional development.

Whatever your individual or corporate training needs, we hope to help. In the following pages, you will find further details of our current offering. Should you have any queries, please get in touch using the contact details on the relevant page.

You can select from over 100 courses, covering foundation, intermediate and advanced levels. As the experts in insurance and financial planning learning we understand what it takes to deliver first-class training and we offer in-house and bespoke training solutions to meet employers' exact requirements. Our training offers great quality and value, and we consistently achieve high standards of delegate feedback and offer member and group savings. Should you have queries, please get in touch with us, and email [business.enquiries@cii.co.uk](mailto:business.enquiries@cii.co.uk).



# Why choose us?

The CII is committed to helping you or your staff develop and maintain the knowledge and skills needed for a successful career. As the leading professional body in insurance and financial planning, our commitment to professional development is backed by an unrivalled understanding of what it takes to deliver first-class face-to-face training solutions.



## **Sector expertise**

No one has a deeper knowledge or wider experience of people development in the insurance and financial planning profession than the CII. This insight – gained through established customer relationships, comprehensive market engagement and direct client feedback – is used to develop topical, practical and affordable training courses.



## **Expert tutors**

The value of any training course is governed by the quality of the tutor. That's why all of our tutors are carefully chosen for their master expertise and proven ability to deliver first-class training. Our tutors combine academic expertise with significant sector experience, helping to ensure courses address the practical needs of insurance and financial planning professionals. We introduce a number of our tutors throughout this brochure.



## **CPD specialists**

Keeping abreast of technical and market developments is a central and ongoing part of any successful career. It also satisfies regulatory obligations and the requirement for qualified CII members to keep their knowledge up to date. Our courses are designed to CII Continuing Professional Development (CPD) accreditation standards and offer a practical and structured way to develop and maintain required knowledge and skills.



## **Flexible approach**

We offer an extensive programme of more than 100 training courses across numerous disciplines, in many cases from foundation through to advanced level. We also offer in-house and bespoke training solutions to meet employers' exact requirements. So, as well as being able to run any of our courses at an employer's premises for groups of staff, we can also adapt existing courses or create completely new courses.

Further, depending on your needs, we offer the opportunity for you to build your desired programme from a combination of courses outlined in this directory.





# Personal Finance Revision Training

Accelerate your exam performance with our online interactive revision workshops.





# AF1: Personal Tax and Trust Planning


## Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the AF1 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Personal Tax and Trust Planning (AF1) is to develop in-depth financial planning skills related to personal tax and trusts.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates will be able to:


- Demonstrate their understanding of the UK income, capital gains and inheritance tax systems.
- Accurately calculate income tax, capital gains tax and inheritance tax liabilities.
- Understand the rules of the UK trusts available.

# AF4: Investment Planning


## Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the AF4 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Investment Planning (AF4) is to develop in-depth financial planning skills related to investments and the management of investment portfolio.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates will be able to evaluate the complex needs of clients and recommend appropriate solutions based upon detailed understanding and analysis of the:


- Economic environment and its impact on investment performance and investment decision making.
- Features, risks and returns of direct financial investments.
- Features, risks and returns of collective investment products, including alternative investments.
- Individual company performance and company accounts.
- Types and measurement of risk and returns.
- Main principles governing how to construct an investment portfolio, investment styles and the management of risk and return.
- Range of portfolio management services.


# AF5: Financial Planning Process


## Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the AF5 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Financial Planning Process (AF5) is to develop an understanding of the financial planning process when giving advice to clients.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates will be able to research and construct a financial plan that demonstrates:


- Understanding of the relationship and responsibilities between adviser and client and the need to establish the scope of the planning brief.
- Evaluation of the different remuneration strategies available and how they might suit the different services required by clients.
- Understanding and evaluation of the client's personal circumstances and financial status.
- Understanding and evaluation of the client's financial objectives, including the importance of prioritising those financial objectives.
- Understanding of the assumptions underlying the financial plan.
- Understanding of what is meant by risk (including capacity of loss), the various risks faced by the client and the importance of the client risk profile in formulating a financial plan.
- Evaluation of the different options available to the client with relevant evidence.
- The ability to put forward an appropriate financial plan based upon analysis of client objectives, circumstances and options.
- The ability to explain the meaning of any technical terms, the features and benefits of proposed products and the consequences of the proposed course of action.
- Understanding of the importance of documenting any changes to the plan required by the client and how to document such changes.
- Understanding of the review process and its significance in the overall financial planning process.


# AF7: Pension Transfers


## Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the AF7 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Pension Transfers (AF7) is to develop the specialist knowledge and skills needed for advising on the transfer of safeguarded benefits. This unit brings you up to date with the fundamental aspects of the pension transfer process; the implications of transferring between different types of pensions; and develops your advice skills across a range of client circumstances and scenarios.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates will be able to use technical knowledge and analysis to:


- Understand the fundamental aspects of the pension transfer process.
- Understand the key issues that should be taken into account when considering a potential transfer of pension benefits.
- Advise on pension transfers in a range of client specific circumstances and scenarios.


# CF1: UK Financial Services, Regulations and Ethics


## Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

### Summary

 **Duration:** 3-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the CF1 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of UK Financial Services, Regulations and Ethics (CF1) is to develop your understanding of the financial services industry including regulation and legislation.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates should be able to demonstrate a knowledge and understanding of the:


- Purpose and structure of the UK financial services industry.
- Different financial asset classes and product types.
- Process of giving advice and the main areas covered.
- Ethics, regulatory processes, rules and legislation underpinning UK financial services.
- Use of the financial regulators' powers and responsibilities to protect the market's integrity and the impact on individuals and firms of these regulators' powers.

# CF6: Mortgage Advice


## Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the CF6 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Mortgage Advice (CF6) is to develop your understanding of the various types of mortgage product and repayment options and the giving of mortgage advice.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates should be able to demonstrate a knowledge and understanding of the:

- House-buying process, from making an offer to completion and the key parties involved.
- Different types of borrowers and how to meet their individual mortgage needs.
- Different types of mortgage product and repayment options and their suitability for the client.
- Legislative and regulatory position of mortgages and the requirements of a mortgage adviser.




## CF8: Long Term Care Insurance


### Description

This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

#### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

#### Who should attend?

If your company has a group who are studying the CF8 unit and require in-house preparation for the exam.

### Learning Objectives/Course Benefits

The objective of Long Term Care Insurance (CF8) is to develop your understanding of long term care (LTC) cover, including legal, taxation and regulatory issues and the responsibilities of local authorities.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates should be able to demonstrate a knowledge and understanding of the:


- Definition, purpose, and scope of long term care contracts and how they interact with State benefits and State-funded long term care.
- Main features and functions of the different types of contracts that can be used to fund long term care and how they can be arranged to meet an individual's needs.
- Principal legal, taxation and regulatory issues that are relevant to advice on long term care insurance.
- Importance of regular reviews to ensure that long term care insurance cover remains appropriate.

# ER1: Equity Release


## Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

### Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the ER1 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Equity Release (ER1) is to develop your understanding of the different types of equity release products, risks to the consumer associated with equity release and application of suitable equity release solutions according to the circumstances of different customers.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates should be able to demonstrate a knowledge and understanding of the:


- Principles of equity release and the types of schemes available.
- Suitability and affordability of the different types of equity release products.
- Risks to the consumer associated with equity release.
- Application of suitable equity release solutions according to the circumstances of different consumers.


# FA1: Life Office Administration


## Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the FA1 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Life Office Administration (FA1) is to develop your understanding of life and pensions issues, together with detailed guidance on the administration of these classes of business.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates should be able to demonstrate a knowledge and understanding of the:


- Basic product types, including group life.
- Principles of financial and medical underwriting.
- Policy issues likely to arise with life policies.
- Administration of life policies, including the different payment methods and consequences of non-payment.
- Handling of life policy claims.


## FA2: Pensions Administration


### Description

This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

#### Summary

 **Duration:** 3-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

#### Who should attend?

If your company has a group who are studying the FA2 unit and require in-house preparation for the exam.

### Learning Objectives/Course Benefits

The objective of Pensions Administration (FA2) develops your understanding of life and pensions issues, together with detailed guidance on the administration of these classes of business.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates should be able to demonstrate a knowledge and understanding of the:


- Regulatory and legislative environment governing pensions.
- Basic principles of pension taxation and administration.
- Basic pension product types, including group pensions.
- With-profits and unit-linked investments.
- Different pensions and options available when taking benefits.


# LF1: Life and Pensions Foundations


## Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

### Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the LF1 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Life and Pensions Foundations (LF1) is to develop knowledge and initial understanding of the life and pensions sector, its purpose, its customers and the financial solutions and operational practices that underpin delivery of good customer outcomes. The Award develops knowledge and understanding across key areas of the life, pensions and long-term savings market. This includes customer needs and solutions, the sector's value to society and the economy, and the importance of professional conduct and maintaining a customer focus.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates should be able to demonstrate knowledge and understanding of:


- The value of the life and pensions sector to society and the economy.
- Key customer needs relating to pensions, protection, investments and savings.
- A range of potential solutions available to meet customer needs.
- How individuals and organisations work as a profession to treat customers fairly and meet their needs effectively.

# LP2: Financial Services Products and Solutions


## Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The content will cover key areas of the syllabus and areas likely to be tested for the exam. There will also be focus on exam style questions with clear debriefs to aid understanding. The duration of each exam revision course can be tailored to the needs of your group. Typically, our LP2 exam revision courses are two days' duration.

### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the LP2 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Financial Services Products and Solutions (LP2) is to develop knowledge and understanding of customer needs, how financial services professionals and organisations identify and provide for these needs, including an understanding of key retail financial products such as savings, investments and tax wrappers.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates will be able to:


- Demonstrate their understanding of key areas of the exam syllabus.
- Clarify areas of the syllabus where they require further guidance.
- Refine their exam technique and ability to identify correct answers.
- Test their knowledge and practise with exam style questions.


## J02: Trusts


### Description

This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

#### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

#### Who should attend?

If your company has a group who are studying the J02 unit and require in-house preparation for the exam.

### Learning Objectives/Course Benefits

The objective of Trusts (J02) is to develop candidates' knowledge and understanding of the various types of trusts.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates will be able to:


- Understand legal principles associated with the creation and management of a trust.
- Understand main types of trusts that are common in the UK.
- Understand taxation considerations relevant to trusts.

# J05: Pension Income Options


## Description

This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

### Who should attend?

If your company has a group who are studying the J05 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Pension Income Options (J05) is to develop knowledge and understanding of pension crystallisation and the drawing of income via various options.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates will be able to:

- Understand the process and implications of decumulating pension funds and the issues facing clients and advisers.
- Understand decumulation options available to members of pensions schemes.
- Understand features, risks and tax treatment of the different options.




# J07: Supervision in a Regulated Environment


## Description

This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

### Who should attend?

If your company has a group who are studying the J07 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Supervision in a Regulated Environment (J07) is to provide an overview of the knowledge required to supervise someone who gives advice on regulated products under the FCA Training and Competence (T&C) requirements in the UK. This includes investment advisers, those who provide advice on mortgages and insurance, and some administration functions covered under the 'overseer' rules.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this unit, candidates will be able to understand:


- The supervisor's role in a regulated organisation
- The principles and practices of recruitment and training
- Attaining, maintaining and supervising competence
- Management information and performance standards
- Financial Services regulation and guidance
- The legal and regulatory aspects of employment and supervision


# J10: Discretionary Investment Management


## Description

This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

### Who should attend?

If your company has a group who are studying the J10 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Discretionary Investment Management (J10) is to develop knowledge and understanding of the role of the discretionary investment manager, and the ability to analyse and apply financial information and portfolio management skills.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this unit, candidates will be able to understand:


- The behaviour, performance, risk profile and correlation of key investment types
- Discretionary and non-discretionary portfolio management
- The principles of performance measurement, financial analysis and ratio analysis
- The principles of performance management and portfolio theory.


# J12: Securities Advice and Dealing


## Description

This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

### Who should attend?

If your company has a group who are studying the J12 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Securities Advice and Dealing (J12) is to develop candidates' knowledge and understanding of the features and risks of different securities, the structure and features of the securities market and relevant factors and considerations for appropriate investment recommendations.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates will be able to:


- Understand the features and risks of different securities.
- Understand the structure and features of the securities market.
- Understand relevant factors and considerations for appropriate investment recommendations.

# R01: Financial Services, Regulation and Ethics


## Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the R01 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Financial Services, Regulation and Ethics (R01) is to develop your knowledge and understanding of the financial services profession, including regulation, legislation and the Code of Ethics.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates will have investigated:


- The purpose and structure of UK financial services.
- How the retail customer is served by the financial services profession.
- Regulatory framework, powers and responsibilities to protect the consumer.
- Legal concepts and considerations relevant to financial advice.
- The CII Code of Ethics and its impact on the business behaviours of individuals.


## R02: Investment Principles and Risk


### Description

This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

#### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

#### Who should attend?

If your company has a group who are studying the R02 unit and require in-house preparation for the exam.

### Learning Objectives/Course Benefits

The objective of Investment Principles and Risk (R02) is to develop your knowledge and understanding of investment products and the application of the investment advice process.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates will have investigated the:


- Characteristics, inherent risks, behaviour and correlation of asset classes and investment products.
- Macro-economic environment and its impact on asset classes.
- Merits and limitations of the main investment theories.
- Nature and impact of the main types of risk on investment performance.
- Performance of investments.


# R03: Personal Taxation


## Description

This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

### Who should attend?

If your company has a group who are studying the R03 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Personal Taxation (R03) is to develop your knowledge and understanding of the UK taxation system, and the ability to analyse the taxation treatment of individuals and trusts during the investment advice process.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates will have investigated the:


- Basic structure of the UK tax system.
- Main taxes on income and capital that may be charged on individuals and trusts, the self-assessment system and how tax liabilities are computed.
- Taxation of investments as relevant to the needs and circumstances of individuals and trusts.


## R04: Pensions and Retirement Planning


### Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

#### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

#### Who should attend?

If your company has a group who are studying the R04 unit and require in-house preparation for the exam.

### Learning Objectives/Course Benefits

The objective of Pensions and Retirement Planning (R04) is to develop your knowledge and understanding of pension and retirement planning issues.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates should be able to demonstrate an understanding of and ability to analyse the:


- Main tax and legal frameworks that govern retirement benefits under registered pension schemes.
- Features of defined contribution and defined benefit pensions.
- State retirement benefits available, including the risks and suitability of contracting out of the State Second Pension.

## R05: Financial Protection


### Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

#### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

#### Who should attend?

If your company has a group who are studying the R05 unit and require in-house preparation for the exam.

### Learning Objectives/Course Benefits

The objective of Financial Protection (R05) is to develop knowledge and understanding of and ability to analyse financial protection planning issues.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates should be able to demonstrate an understanding of and ability to analyse the following:

- The purpose and scope of financial protection products and how they interact with State benefits.
- The main features and functions of the different types of contracts and how they are arranged in order to meet the individual client's protection needs.
- The main protection needs of businesses.




## R06: Financial Planning Process


### Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

#### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

#### Who should attend?

If your company has a group who are studying the R06 unit and require in-house preparation for the exam.

### Learning Objectives/Course Benefits

The Financial Planning Practice (R06) unit has been developed to help advisers develop and demonstrate their financial planning capabilities.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

This unit enables candidates to demonstrate their expertise in the application of the financial planning process through combining and applying learning content from all the other units in the CII RQF Level 4 Diploma in Regulated Financial Planning:


- Financial services, regulation and ethics.
- Investment principles and risk.
- Personal taxation.
- Pensions and retirement planning.
- Financial protection.


## R07: Advanced Mortgage Advice


### Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group. Typically, our exam revision courses are two or three days' duration, depending on the subject and level of the unit.

#### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

#### Who should attend?

If your company has a group who are studying the R07 unit and require in-house preparation for the exam.

### Learning Objectives/Course Benefits

The objective of Advanced Mortgage Advice (R07) is to provide candidates with knowledge and understanding of the key elements of the mortgage process, specialist types of mortgage lending and to test candidates' ability to give appropriate mortgage advice to clients with complex needs and circumstances.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates should understand the following:

- Key elements of the mortgage process.
- Specialist types of mortgage lending.
- Appropriate mortgage advice to clients with complex needs and circumstances.

# International Awards Revision Training

Certificated courses to support your professional development needs.




# W01: Award in General Insurance


## Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

### Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the W01 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objectives of W01 are to provide candidates with the:

- basic principles of insurance;
- main legal principles related to insurance contracts;
- main regulatory principles related to insurance business; and
- key elements to protect consumers.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates will be able to:


- Understand the nature and main features of risk and insurance.
- Know the structure and main features of the insurance market.
- Understand the main legal principles governing insurance contracts.
- Understand the main regulatory and legal principles applicable to the transaction of insurance business.
- Know key aspects of ethics, corporate governance and internal controls.


## W04: Award in Customer Service in insurance


### Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

#### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

#### Who should attend?

If your company has a group who are studying the W04 unit and require in-house preparation for the exam.

### Learning Objectives/Course Benefits

The objectives of W04 are to provide candidates knowledge and understanding of the customer service within the context of an insurance environment.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates will be able to:


- Know how to fulfil customer requirements in the insurance sector.
- Understand the importance of customer feedback to improve service in the insurance sector.
- Understand the importance of good communication to maintain and build client relationships in the insurance industry.
- Know how to deal with conflict within an insurance environment.
- Understand the importance of keeping accurate and confidential records when dealing with customers.
- Know how to manage own workload and time to meet business requirements and timescales.
- Know how to work with others to achieve team and organisational objectives.
- Understand the sales process.
- Know how to increase sales activities.


# WUE: Insurance Underwriting


## Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the WUE unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of WUE is to provide knowledge and understanding of the role of underwriting including identification, assessment and acceptance of risk, rating and relevant financial factors.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates will be able to understand the following:


- The material facts and information relating to the insurance underwriting process.
- Underwriting procedures relating to the insurance underwriting process.
- Insurance policies in relation to the insurance underwriting process.
- Renewals and cancellation in relation to the insurance underwriting process.
- Personal insurances in relation to the insurance underwriting process.
- Commercial insurances in relation to the insurance underwriting process.
- The main support/ancillary services available in the insurance industry.
- Underwriting considerations in relation to the insurance underwriting process.
- The principles and practices of pricing.
- Pricing factors within the context of the insurance underwriting process.
- Managing exposure within the context of the insurance underwriting process.


# WCE: Insurance Claims Handling


## Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the WCE unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of WCE is to provide knowledge and understanding of the claims handling process including notification, assessment, settlement and associated financial factors.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

At the end of this course delegates will be able to understand the following:

- The general principles in the claims handling process.
- Insurance products and associated services.
- Claims considerations and administration.
- Claims handling procedures and related claims services.
- The claims function and how it may be structured.
- Claims settlement.
- How expenses are managed.

# General Insurance Revision Training

Grasp the essential areas of an exam syllabus to boost your existing knowledge.







# IF1: Insurance, Legal and Regulatory


## Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

### Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the IF1 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Insurance, Legal and Regulatory (IF1) is to provide candidates with knowledge and understanding of the basic principles of insurance, including the main legal principles related to insurance contracts and insurance business, and the key elements to protect consumers.

This revision course:


- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.


## IF2: General Insurance Business


### Description


This interactive course is designed to accelerate candidates learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

#### Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

#### Who should attend?

If your company has a group who are studying the IF2 unit and require in-house preparation for the exam.

### Learning Objectives/Course Benefits

The objective of General Insurance Business (IF2) is to provide candidates with knowledge and understanding of insurance products and practice, including underwriting and policy wordings, claims, customer service and information and communication technology.

This revision course:


- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.


## IF3: Insurance Underwriting Process


### Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

#### Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

#### Who should attend?

If your company has a group who are studying the IF3 unit and require in-house preparation for the exam.

### Learning Objectives/Course Benefits

The objective of Insurance Underwriting Process (IF3) is to provide candidates with knowledge and understanding of the role of underwriting including identification, assessment and acceptance of risk, rating and relevant financial factors.

This revision course:


- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.


## IF4: Insurance Claims Handling Process


### Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

#### Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

#### Who should attend?

If your company has a group who are studying the IF4 unit and require in-house preparation for the exam.

### Learning Objectives/Course Benefits

The objective of Insurance Claims Handling Process (IF4) is to provide candidates with knowledge and understanding of the claims handling process including notification, assessment, settlement and associate financial factors.

This revision course:


- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.


## IF5: Motor Insurance Products


### Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

#### Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

#### Who should attend?

If your company has a group who are studying the IF5 unit and require in-house preparation for the exam.

### Learning Objectives/Course Benefits

The objective of Motor Insurance Products (IF5) is to provide candidates with knowledge and understanding of the practices and procedures connected with private motor, motorcycle and commercial motor insurance.

This revision course:


- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.


# IF6: Household Insurance Products


## Description


This interactive course is designed to accelerate candidates learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

### Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the IF6 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Household Insurance Products (IF6) is to provide an overview of the products, practices and procedures of household insurance and associated personal lines insurances in the UK.

This revision course:


- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.


# IF7: Healthcare Insurance Products


## Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

### Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the IF7 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Healthcare Insurance Products (IF7) is to provide knowledge and understanding of the fundamental principles and practices relating to healthcare insurance.

This revision course:


- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.


## IF8: Packaged Commercial Insurances


### Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

#### Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

#### Who should attend?

If your company has a group who are studying the IF8 unit and require in-house preparation for the exam.

### Learning Objectives/Course Benefits

The objective of Packaged Commercial Insurances (IF8) is to provide knowledge and understanding of the development and design of packaged commercial policies, scope of cover provided by the most common forms of packaged commercial policy, and arrangement and operation of packaged commercial insurance contracts.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.





## IF9: Customer Service in Insurance


### Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

#### Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

#### Who should attend?

If your company has a group who are studying the IF9 unit and require in-house preparation for the exam.

### Learning Objectives/Course Benefits

The objective of Customer Service in Insurance (IF9) is to provide knowledge and understanding of the customer service within the context of an insurance environment.

This revision course:


- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.


# LM1: London Market Insurance Essentials


## Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the LM1 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

At the end of this course delegates should be able to:

- Understand basic terminology used within the general insurance market.
- Understand the fundamental principles of insurance.
- Understand the main classes of insurance written in the London Market.
- Understand the insurance cycle.
- Understand reinsurance within the insurance market.
- Understand the structure of the London Market.
- Understand the London Market's regulatory and legal environment.
- Understand the importance of appropriate systems and controls.
- Understand data protection and money laundering legislation and requirements.
- Understand the broker's role in the way that business is conducted in the London Market.
- Understand the underwriter's role in the way that business is conducted in the London Market.

This revision course:


- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.


## LM2: London Market Insurance Principles and Practices


### Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

#### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

#### Who should attend?

If your company has a group who are studying the LM2 unit and require in-house preparation for the exam.

### Learning Objectives/Course Benefits

At the end of this course delegates should be able to:

- Understand the business nature of the London Market.
- Understand the main classes of insurance written in the London Market.
- Understand reinsurance within the insurance market.
- Understand market security.
- Understand the regulatory and legal requirements applicable to the transaction of insurance business.
- Understand insurance intermediation in the London Market.
- Understand the underwriting function within the context of the London Market.
- Understand the way that business is conducted in the London Market.
- Understand the purpose, benefits and operation of delegated underwriting.
- Know the handling of claims in the London Market.
- Understand the main methods of resolving complaints.

This revision course:


- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

## LM3: London Market Underwriting Principles


### Description


This interactive course is designed to accelerate candidates' learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

#### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

#### Who should attend?

If your company has a group who are studying the LM3 unit and require in-house preparation for the exam.

### Learning Objectives/Course Benefits

At the end of this course delegates should be able to:

- Understand the framework within which business is conducted in the London Market.
- Understand the role, purpose and implications of policy wording in practice.
- Understand the role and importance of business planning and capital setting in the London Market.
- Understand the pricing of risk at an individual and at a portfolio level.
- Understand the various methods of writing business and distribution.

This revision course:


- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.


## M05: Insurance Law


### Description


This interactive course is designed to accelerate candidates learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

#### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

#### Who should attend?

If your company has a group who are studying the M05 unit and require in-house preparation for the exam.

### Learning Objectives/Course Benefits

The objectives of Insurance Law (M05) are to provide candidates with knowledge and understanding of the laws, which form the background to the operation of insurance, the system within which these laws operate and are administered, and apply knowledge and skills to practical situations.

This revision course:


- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.


# M21: Commercial Insurance Contract Wording


## Description


This interactive course is designed to accelerate candidates learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the M21 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Commercial Insurance Contract Wording (M21) is to develop knowledge and understanding of commercial (re)insurance contract wordings and the legal, regulatory and drafting issues surrounding these wordings.

This revision course:


- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.


# M80: Underwriting Practice


## Description


This interactive course is designed to accelerate candidates learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the M80 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Underwriting Practice (M80) is to accelerate and develop the students' knowledge and understanding of the fundamental principles and practices of underwriting practice and the environment within which they operate.

This revision course:


- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.


# M85: Claims Practice


## Description


This interactive course is designed to accelerate candidates learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

If your company has a group who are studying the M85 unit and require in-house preparation for the exam.

## Learning Objectives/Course Benefits

The objective of Claims Practice (M85) is to accelerate and develop the student's knowledge and understanding of the fundamental principles and practices of claims practice and how claims are handled.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.





## M92: Insurance Business and Finance


### Description


This interactive course is designed to accelerate candidates learning towards an exam pass. The course provides expert insight and tuition both on the technical knowledge required and the skills needed to optimise performance. The duration of each exam revision course can be tailored to the needs of your group.

#### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

#### Who should attend?

If your company has a group who are studying the M92 unit and require in-house preparation for the exam.

### Learning Objectives/Course Benefits

The objective of Insurance Business and Finance (M92) is to provide candidates with knowledge and understanding of the fundamental principles and practices of insurance business and finance practice.

This revision course:

- Highlights key areas of the exam syllabus.
- Helps delegates identify areas of the syllabus that they may like further guidance on.
- Provides guidance on exam techniques.
- Provides opportunities for delegates to test their knowledge and practice exam style questions.

# Technical Workshops

Refresh your existing knowledge or develop new skills.





# Introduction to Business Interruption


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group. This course is designed for brokers or underwriters that have some basic knowledge of property insurance. Using real case illustrations and exercises the training will address the key issues of BI, understanding the cover and ensuring it meets client needs.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

This course is designed for brokers or underwriters that have some basic knowledge of property insurance.

## Learning Objectives

During the course several exercises are undertaken (depending on the emphasis required) but will usually include:

- Calculating the gross profit sum insured.
- Factors that affect indemnity periods.
- Assessing limits for supplier's extensions.

Example wordings will be used throughout the course.

## Learning Outcomes

By the end of the workshop delegates will be able to:


- Explain how to overcome the problems of handling this class of business.
- Explain in detail how a gross profit figure is arrived at from a set of accounts.
- Explain in detail the workings of the standard gross profit, revenue and fees policy covers and definitions and explain how they work in practice to enable delegates to select the most appropriate cover for their clients.
- Provide a detailed explanation of the difference between declaration linked and traditional (sum insured) methods of arriving at a gross profit figure and recognise the advantages and disadvantages of both.
- Outline how the COVID-19 business interruption litigation has impacted business interruption insurance.
- Explain in detail the main features of a business that will affect the setting of an appropriate maximum indemnity period.
- Describe the typical coverage extensions provided on a business interruption policy.
- Detail how a simple claim is settled and the role of the loss adjuster.
- Recognise the main features of a risk that will influence an underwriter in their assessment of acceptability and rating.


# Introduction to Commercial Packages


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group. This course provides an overview of commercial packages. It offers a review of the way commercial insurance package business is provided to the market and administered.

### Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

The workshop is ideal for those with less than twelve months experience of commercial insurance.

## Learning Objectives

In this workshop we outline the risks small and medium-sized businesses face and then describe how commercial package insurance addresses those risk needs.

## Learning Outcomes

By the end of the workshop delegates will be able to:


- Identify the key risks faced by a business and how the exposures will vary between different trades.
- Describe the coverage provided under commercial package and commercial combined policies.
- Explain the advantages and disadvantages of commercial package policies and commercial combined policies.
- Outline the key elements of commercial package coverage.
- Compare and contrast commercial packages aimed at different trades.
- Outline the underwriting considerations of commercial package insurance.


# Introduction to Contract Works Insurance


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group. This course provides a useful introduction into contract works insurance and the way it is handled in the market.

### Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

This course provides training for those who already have an awareness of contract works insurance, but who wish to add to this knowledge.

## Learning Outcomes

By the end of the workshop delegates will be able to:


- Describe the risks involved in contractors' insurance.
- Explain the difference between contractual obligations and insurance requirements.
- Describe how standard contracts such as the JCT clauses can affect the client's insurance arrangements.
- Describe the major elements of contract works insurance policies.
- Describe insurers' underwriting requirements.


# Introduction to Construction Insurance


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group. This workshop introduces the subjects of contract works, contractors' all risks and contractors' liability insurance.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

This workshop is suitable for those who are relatively new to the subject. No previous contract works experience is required, but a good grounding in the basics of construction insurance should still be regarded as a pre-requisite.

## Learning Objectives

This course highlights an awareness of the standard structure, and content of contract works and contractors' liability insurance policies and the optional extras usually available and also demonstrate an awareness of the underwriting process and the information insurers require to assess and price risks.

## Learning Outcomes

By the end of the workshop delegates will have an understanding of:


- Contract works insurance and the various ways cover is provided.
- The usual content of contract works and contractors' liability insurance policies and the usual optional extras.
- The insurance clauses within the JCT contract and the difference between contractual and insurance requirements.
- The underwriting and claims processes.


# Introduction to Cyber Risks Insurance


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The Introduction to Cyber Risks Insurance course looks at the cyber risk limitations and exclusions for typical and traditional corporate insurance cover and the specialist cyber insurance solutions currently available.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

Those who have an understanding of the principle of insurance together with a grounding in property, business interruption, general liability and errors and omissions insurances.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- What are cyber risks – demystifying some terminology?
- What types of organisation are exposed to cyber risks?
- The cover provided by conventional insurance policies against cyber risks.
- The cover, conditions and exclusions of specialist cyber risks insurance policies in the UK – covering third-party and first-party costs.
- How cyber risks policies relate to other covers such as professional indemnity, business interruption and crime.
- Insurers' information requirements and underwriting considerations for cyber risks insurance.
- The main considerations when dealing with cyber risks insurance claims.

## Learning Outcomes

By the end of the workshop delegates will be able to:


- Identify which types of customer could benefit from insurance against cyber risks.
- Consider why businesses do not buy cyber policies.
- Describe the extent of cover provided by conventional insurance policies against cyber risks.
- Describe the policy cover, conditions and exclusions of specialist cyber risks insurance policies in the UK.
- Outline the major risk, underwriting and rating considerations of cyber risks insurance.
- Outline the main considerations when dealing with cyber risks insurance claims.


# Introduction to Directors' and Officers' Liability Insurance


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group. This course focuses on who directors and officers are and their principle duties. The course introduces delegates to the benefits of directors' and officers' insurance and the coverage afforded and brings them up to date with recent changes in the law.

### Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

This interactive workshop is suitable for delegates who are new to directors' and officers' liability insurance.

## Learning Objectives

In this course, we cover the following topics:

- Directors' and officers' liabilities.
- Recent claim examples.
- Recent changes in case law, company law and other legislation.
- Policy coverage.
- Underwriting considerations.
- Claims management.

## Learning Outcomes

By the end of the workshop delegates will be able to:

- Explain why directors and their organisations need directors' and officers' liability or management liability coverage.
- Explain how the legal exposures of directors and companies are evolving.
- Use relevant claim examples to demonstrate the need for directors' and officers' liability or management liability insurance.
- Identify which clients who have greatest need for directors' and officers' liability or management liability insurance.
- Explain the major benefits of a directors' and officers' liability or management liability insurance.
- Describe the policy coverage provided under directors' and officers' liability or management liability policies.
- Identify the underwriting considerations for directors' and officers' liability or management liability insurance.
- Outline how insurers handle directors' and officers' liability or management liability insurance claims.
- Explain current developments in the directors' and officers' liability or management liability insurance market.





# Introduction to Employment Practices Liability Insurance


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group. An ideal introduction to the subject of employment practices liability insurance

### Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

This course has been designed for delegates with an interest in knowing about employment practices liability, its associated risks and the methods of providing appropriate insurance cover.

## Learning Objectives

In this course, we cover the following topics:

- Background to employment practices liability insurance.
- Changes in employment law.
- Relevant employment relations acts.
- Employees' increasing rights.
- Discrimination.
- Minimum Wage Directive.
- Human Rights Act 2000.
- Data Protection Act.
- Employment practices liability insurance and the buyer.

## Learning Outcomes

By the end of the workshop delegates will be able to:


- Explain why organisations need employment practices liability coverage.
- Outline how changes in legislation have impacted the exposure of organisations to employment practices claims.
- Use relevant claim examples to demonstrate the need for employment practices liability insurance.
- Explain the major benefits of employment practices liability insurance.
- Describe the policy coverage provided under an employment practices liability policy.
- Identify the differences between employment practices liability policy coverage and commercial legal expenses insurance which also covers employment disputes.
- Describe the underwriting considerations for directors' and officers' liability and management liability insurance.
- Outline how insurers handle employment practices liability insurance claims.
- Explain current developments in the employment practices liability insurance market.


# Introduction to General Insurance


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group. This workshop will provide participants with an overview of the types of general insurance sold in the UK and around the world and how they are distributed and priced.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

Any new entrant to the insurance or reinsurance industry working directly in the market or in a supporting area.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- Consumer insurances.
- Commercial insurances.
- Consumer v. commercial insurance.
- General commercial.
- Speciality.
- The underwriting process.
- The claims process.
- The future.

## Learning Outcomes

By the end of the workshop delegates will be able to:


- Outline the main classes of general insurance.
- Explain how general insurance is underwritten and sold.
- Identify the underwriting considerations of the principal general insurances.
- Explain how claims are handled under the main types of general insurance.


# Introduction to Insurance


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group. This course provides an overview of the basic principles of insurance and an introduction to insurance practice.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

Any new entrant to the insurance or reinsurance industry working directly in the market or in a supporting area.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- The basic principles of insurance.
- Terminology.
- Policy structure.
- The key forms of insurance.
- Reinsurance and its purpose.

## Learning Outcomes


By the end of this workshop delegates will have gained an excellent grounding in insurance principles and practice.

# Introduction to Insurance Contract Law


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. This introductory level course is designed to develop delegates' knowledge and understanding of the principles and practices of insurance and insurance contract law.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

All insurance staff, from brokers or other intermediaries, through to those involved in underwriting, claims, insurance programme design or placement, risk managers, sales or administration. Also lawyers and other professionals whose work brings them into contact with the business of insurance.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- General principles of contract law.
- Legal principles governing the formation of insurance contracts:
  - the doctrine of insurable interest; and
  - the doctrine of utmost good faith: misrepresentation and the duty of disclosure in relation to insurance.
- Warranties, conditions and other terms of insurance contracts.
- Void and illegal insurances.
- Making an insurance claim – legal rules governing notice and proof of loss.
- Construction (interpretation) of insurance contracts, including statutory and common law rules.
- The doctrine of proximate cause.
- Measuring the loss – the principle of indemnity.
- The doctrines of subrogation and contribution.
- Exercise and case studies.

## Learning Outcomes

At the end of this workshop delegates will be able to:

- Explain the general principles of contract and business law as they apply to insurance.
- Outline the special principles of insurance contract law.
- Define the legal rules that affect particular classes of insurance, including marine insurances and the compulsory classes (EL and motor in the UK).


Emphasis is placed on English law but, where appropriate, comparison with US, continental and other legal systems is made.

# Introduction to Insurance and the London Insurance Market


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The duration of each course is typically one day, but this can be tailored to the needs of your group. The workshop will provide an insight into insurance and the insurance market, including a brief history, an overview of the market place, the role of the participants, its processes and procedures. The workshop will contain a range of exercises and games to explain and help the participants understand insurance and the insurance market.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

Ideal for any new entrant to insurance and the Lloyd's syndicate, broker, insurer, reinsurer, accountant or loss adjuster, to enable them to understand the London Market and current market practice.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- The basic principles of insurance: terminology, policy structure and the key forms of insurance.
- Reinsurance and its purpose.
- The development of the London Market,
- The who, what and why of Lloyd's,
- The role of the broker including ethical consideration,
- The international nature of London – current issues and trends in the London Market.

## Learning Outcomes

By the end of the workshop delegates will be able to:


- Explain the purpose and benefits of insurance.
- Outline the key principles of insurance.
- Identify the types of insurance and reinsurance.
- Explain the role of the insurance market participants.
- Describe the strengths of Lloyd's and the London Market.
- Describe the placing and claims processes in Lloyd's and the insurance market.
- Outline planned and possible future developments within the insurance market.


# Introduction to Liability Insurance


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group. This course is designed to put liability insurance into context and to introduce the delegates to the operation and principles of liability insurance.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

All insurance staff, from brokers or other intermediaries, through to those involved in underwriting, claims, insurance programme design or placement, risk managers, sales or administration. Also lawyers and other professionals whose work brings them into contact with the business of insurance.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- What is liability?
- How liability arises, including common law, statute and contract.
- Types of liability cover, exclusions and conditions for each.
- Employers' Liability Compulsory Insurance Act.
- Limits of liability.
- Risk assessment and pricing.
- USA exposures.
- Industrial diseases.
- Risk management and health and safety legislation.
- Claims handling, the litigation process and current practices.

## Learning Outcomes

By the end of the workshop delegates will have:


- A valuable overview of liability insurance.
- An understanding of the different types of liability insurance available.
- A valuable overview of risk assessment and pricing, risk management and claims handling.


# Introduction to Life Insurance


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group. This workshop will provide participants with an overview of the types of life and long-term insurance sold in the UK and around the world and how they are distributed and priced.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

Insurance staff, from brokers or other intermediaries, through to those involved in underwriting, claims, insurance programme design or placement, risk managers, sales or administration.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- Long-term insurance market.
- Regulation.
- Distribution.
- Customer needs.
- Scope of cover.
- Types of products and their use.
- Underwriting and risk assessment.
- Claims administration.

## Learning Outcomes

By the end of the workshop delegates will be able to:


- Describe the main features of the UK long-term insurance market.
- Identify the main types of life and long-term insurance sold.
- Describe how life insurance products are priced and distributed.

# Introduction to Lloyd's and the London Market


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group. This course provides an overview of the development of the London Market necessary to understand current practice. The session will give an insight into the key issues facing the London Market today and in the future.

### Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

Ideal for any new entrant to a Lloyd's syndicate, broker, insurer, reinsurer, accountant or loss adjuster, to enable them to understand the London Market and current market practice.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- The development of the London Market.
- The who, what and why of Lloyd's.
- International Underwriting Association.
- The role of the broker including ethical considerations.
- The international nature of London – current issues and trends in the London Market.
- The future, including electronic trading/support.

## Learning Outcomes

By the end of the workshop delegates will have:

- Gained a brief but comprehensive view of the London Market and its future role.
- Built foundation knowledge of the London Market.





# Introduction to Motor Fleet Insurance


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group. In this workshop we provide an overview and an update on motor fleet insurance from a broking perspective.

### Summary

 **Duration:** 1–2 day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

Those with hands-on experience of insurance who wish to gain a better understanding of motor fleet insurance.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- Legal developments that have impacted motor fleet insurance.
- Typical coverage provided under a motor fleet insurance.
- Motor fleet claims.
- Pricing of motor fleet.

## Learning Outcomes

By the end of the workshop delegates will be able to:


- Outline recent legal developments that have impacted motor fleet insurance.
- Explain the typical coverage provided under a motor fleet insurance.
- Describe what aspects impact the pricing of a motor fleet risk.
- Identify where motor fleet rating will help a customer.
- Describe how motor fleet claims can be handled efficiently utilising technology.
- Explain the measures motor fleet managers can take to reduce their risks and improve their claims experience.


# Introduction to Motor Trade Insurance


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group. In this workshop we provide an overview and an update on motor trade insurance from a broking perspective.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

This course has been designed for delegates with no previous involvement in motor trade insurance.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- Primary risks associated with motor trade businesses.
- An examination of the reasons why a motor trader needs a special type of motor insurance policy.
- A review of the law relating to motor insurance with particular reference to the Motor Insurance Database.
- Policy wordings and conditions and exclusions.
- Popular policy extensions.
- How the different types of motor trade insurance are rated and an examination of the relevant underwriting factor.

## Learning Outcomes

By the end of the workshop delegates will be able to:


- Describe the types of commercial vehicles and the risks associated with each.
- Identify the key risks associated with motor trade businesses.
- Describe the main aspects of motor trade insurance.
- Explain the structure and usual content of insurance policy wordings, including popular extensions.
- State how the Motor Insurance Database impacts on motor trade businesses.
- Explain a motor trader's obligations under the Motor Insurance Database.
- Outline the key underwriting and rating considerations for motor trade insurance.


# Introduction to Personal Insurances


## Description


This one-day course provides an overview of the personal insurance market. The training presented is in an interactive style, with activities to help reinforce learning. Delegate participation is encouraged.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

This training is ideal for anyone who is new to the insurance industry or administrative staff working directly in the market or supporting areas.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- The personal lines market and developments.
- Private motor insurance – levels of cover.
- Household insurance, main types of cover, optional extensions and exclusions.
- Travel insurance, types of cover, optional extensions and exclusions.
- Claims procedures.
- Consumer disputes and the impact of fraud.

## Learning Outcomes

By the end of the workshop delegates will be able to:


- Build a foundation knowledge of the core personal insurance products.
- Appreciate the scope of cover, for private motor, household and travel insurance products.
- Be aware of the impact of fraud and the insurance sector's steps to combat fraud.


# Introduction to Professional Indemnity Insurance


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group. This course provides an overview and an update of professional indemnity insurance from a broking perspective.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

All insurance staff, from brokers or other intermediaries, through to those involved in underwriting, claims, insurance programme design or placement, risk managers, sales or administration. Also lawyers and other professionals whose work brings them into contact with the business of insurance.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- The duty of care owed by professionals – legal liability and breach of contract.
- Examples of professional negligence claims.
- Professional indemnity and errors and omissions policy.
- Key elements of cover.
- The proposal and underwriting process – how an underwriter uses the details provided to rate the risk.
- The claims process, including incident reporting and PI protocols.

## Learning Outcomes

By the end of the workshop delegates will be able to:


- Describe what types of organisations have a professional liability exposure and require professional indemnity insurance.
- Outline recent examples of professional indemnity claims.
- Describe the principal reasons why professionals or service companies should buy professional indemnity insurance.
- Explain the coverage provided by a professional indemnity insurance policy.
- Explain how professional indemnity coverage fits with other liability coverages and identify areas where there may be an overlap in cover.
- Outline the principal underwriting and pricing considerations that apply to professional indemnity insurance.
- Outline recent changes in the professional indemnity insurance market.
- Explain the important points to remember when dealing with a professional indemnity claim.


# Introduction to Reinsurance


## Description


This workshop covers the key elements of reinsurance methods and practices, including the application of facultative and treaty business and the considerations made when transacting reinsurance and underwriting and purchasing proportional and non-proportional treaties. Reinsurance is examined from the viewpoint of both the reinsurer and the reinsured.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

New entrants to the insurance or reinsurance industry working directly in the market or supporting area.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- Benefits of reinsurance.
- Reinsurance market key players.
- Uses of facultative and treaty reinsurance.
- Application of proportional reinsurance.
- Quota share.
- Surplus.
- Application of non-proportional reinsurance.
- Excess of loss.
- Stop loss/aggregate excess of loss.
- Reinsurance programme design.
- Reinsurance underwriting.
- Operation of reinsurance contracts including claims.
- Alternative risk transfer.

## Learning Outcomes

By the end of the workshop the delegates will be able to:


- Describe how insurers use facultative and treaty reinsurance to protect themselves and increase their capacity.
- Identify the key players in the reinsurance market.
- Explain how proportional reinsurances operate.
- Explain how non-proportional reinsurance operate.
- Identify the key elements of reinsurance programme design.
- Describe how insurers and their reinsurers can work effectively with each other.
- Outline how alternative risk transfer methods can be used to protect insurers and reinsurers.


# Intermediate Business Interruption Insurance


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group. This one-day interactive course provides participants with an opportunity to explore business interruption insurance in more depth than the introduction-level workshop.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

This one-day interactive workshop is suitable for delegates who have had a hands-on experience with this class of business for a minimum of two years.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- Typical customer attitudes shown to business interruption insurance and the role of the broker in overcoming problems arising from these.
- A comprehensive review of gross profit cover, including the other main covers (revenue, fees, increased cost of working, additional increased cost of working).
- Setting an estimate or sum insured from a set of accounts and projecting this using both declaration linked and traditional methods.
- Features that have a bearing on the setting of the maximum indemnity period and how these can affect the underwriter's assessment of EML.
- Risk assessment and rating influenced by the information obtained from the client.
- Business interruption extensions commonly requested.
- Calculating a simple business interruption claim.

## Learning Outcomes

By the end of the workshop delegates will be able to:


- Explain how to overcome the problems of handling this class of business.
- State in detail how a gross profit figure is arrived at from a set of accounts.
- Explain in detail the workings of the standard gross profit, revenue and fees policy covers and definitions and explain how they work in practice to enable delegates to select the most appropriate cover for their clients.
- Provide a detailed explanation of the difference between declaration linked and traditional (sum insured) methods of arriving at a gross profit figure and recognise the advantages and disadvantages of both.
- Explain in detail the main features of a business that will affect the setting of an appropriate maximum indemnity period.
- Detail how a simple claim is settled and the role of the loss adjuster.
- Recognise the main features of a risk that will influence an underwriter in their assessment of acceptability and rating.
- Detail what cover is available for damage occurring away from the client's premises and identify the main extensions available.


# Intermediate Commercial Property


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. This one-day interactive course takes a more in-depth look at commercial property insurance, policy cover and associated claims and underwriting considerations.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

This course has been designed for delegates with previous involvement in commercial property insurance. A good grounding in commercial property insurance practices is desirable.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- Practical applications including the different types of cover available, and considerations of which cover is most suitable for each case.
- Risk assessment and the major hazards presented with different classes of business.
- Commercial property insurance policy cover and typical extensions available and restrictions which might be applicable in different circumstances.
- Policy terms, conditions and exclusions.
- Key underwriting considerations.
- Key claims considerations and the principles of claims handling for commercial property insurance.
- Typical methods of investigation used in commercial property insurance claims handling.

## Learning Outcomes

By the end of the workshop delegates will be able to


- Describe the main aspects of commercial property insurance and the protection provided.
- List the most commonly encountered issues.
- Have a sound understanding of the various types of cover available.
- Outline the policy structure and the levels of cover which may be available.
- Explain more advanced applications of how the cover works.
- Outline the key underwriting and claims considerations relating to commercial property insurance.


# Intermediate Construction Insurance


## Description


This course provides an explanation of the covers specific to the construction industry, the standard forms of contract entered into by contractors, and an analysis of how risks are assessed. Whilst there is some consideration of the contractual implications within JCT for liability risks, the prime focus of the course is on contractors' all risks, and property insurance. This is an interactive workshop with a mixture of tuition and case studies.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

This course has been designed for delegates with hands-on involvement in construction insurance.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- An introduction to contract conditions.
- JCT standard form of contract including design and build version.
- Risk and responsibilities.
- Insurance clauses – joint names implications.
- Collateral warranties.
- Policy cover – an analysis of contractors all risks, employers' liability, and public and product liability.
- Non-negligence covers.
- Design and build professional indemnity.

## Learning Outcomes

By the end of the workshop delegates will be able to:

- Understand why the cover is needed and how it is provided.
- Understand the content of the risk and insurance clauses in the JCT standard and design and build contract and the implications for both contractors, insurers and property owners.
- Be familiar with the cover, exclusions and restrictions usually found in a contract works policy.
- Be aware of the factors insurers consider in the assessment and pricing of risk.



# Intermediate Cyber Risks Insurance


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group.


The modern business world is now heavily reliant on IT systems and infrastructure to support its business-critical activities. Businesses also operate in a connected world where they and their employees make use of email, social networking and cloud computing. All this leads to additional risks to the business, some of which is not customarily covered by existing insurance arrangements.


This course follows on from our introductory Cyber Insurance course and looks, in greater detail, at the extent of cover provided by conventional insurance policies against cyber risks, as well as the conditions and exclusions of specialist cyber risks insurance policies. The course also looks at the different cover options available, how they apply to different clients, the key risk management issues and claims matters.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

Delegates who have attended our introductory Cyber Insurance course, or those that have an understanding of the concepts of cyber insurance, who would like to go further into the application of conventional and specialist cyber insurance covers, conditions and exclusions.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- What are cyber risks?
- The impact of cloud computing on cyber risks.
- Cover provided by conventional insurance policies against cyber risks – gap analysis.
- The cover, conditions and exclusions of specialist cyber risks insurance policies in the UK – identifying main differences in cover available.
- Major risk management issues of cyber risks.
- Examples of cyber risks insurance claims and the issues of dealing with such claims.

## Learning Outcomes

By the end of the course delegates will be able to demonstrate an understanding of:


- The main cyber risks and which types of customer could benefit from insurance against cyber risks.
- Impact of cloud computing on cyber risks.
- The extent of cover provided by conventional insurance policies against cyber risks.
- The policy cover, conditions and exclusions of specialist cyber risks insurance policies in the UK and when separate policies are appropriate.
- Different cover options available in the cyber policy market and how they apply to different clients.
- Key risk management issues.
- How cyber risk insurance claims arise and the issues of dealing with these claims.


# Intermediate Directors' and Officers' (Including Employment Practices) Liability


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group. This course provides participants with an opportunity to explore directors' and officers' liability insurance in more depth than the introduction-level workshop.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

This course provides training for those who have a basic understanding of directors' and officers' liability and employment practices liability but who wish to develop further their knowledge and the methods of providing appropriate insurance cover.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- Who is insured.
- How liability can arise, including the Bribery Act 2010.
- Risk assessment case study.
- Policy covers comparison, including major exclusions and extensions.
- How D&O cover fits in the client's portfolio.
- Underwriting considerations.
- Dealing with a directors' and officers' liability claim.

## Learning Outcomes

By the end of the workshop delegates will be able to:


- Explain the major benefits of a directors' and officers' liability policy.
- Explain how directors' and officers' liability insurance dovetails with other liability insurances.
- Identify the underwriting considerations for directors' and officers' liability insurance.
- Identify clients who have greatest need for directors' and officers' liability insurance.
- Outline how to handle a directors' and officers' liability insurance claim.
- Explain current developments in the directors' and officers' liability insurance market.


# Intermediate Liability Insurance


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group. This workshop will provide participants with an opportunity to explore EL, public and products liability insurance in more depth than the introductory workshop.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

Anyone who wishes to widen their technical knowledge on liability insurance and who have attended the Introduction to Liability Insurance workshop.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- The various types of EL, PL and products liability policy available and considers how each works in detail.
- The various ways in which liability arises, either through Acts of Parliament, common law or court precedent, reviewing court decisions.
- The policy wordings and the typical extensions and restrictions applying in different circumstances.
- Policy covers as affected by wordings such as claims occurring or claims made.
- Underwriting methods, both for individual risks and also for whole accounts and the impact of legislation including health and safety regulations.
- The consideration given to disease claims.
- The way claims are handled with specific reference to court procedures and protocols.

## Learning Outcomes

By the end of the course the delegates will be able to:


- Explain recent developments which impact liability insurance exposure.
- Outline how a liability policy works and what it covers.
- Explain liability policy jargon e.g., 'claims made' v. 'claims occurring'.
- Compare and contrast the coverage provided under employers' liability, public liability and products liability policy wordings
- Explain how organisations should set the right liability limits.
- Describe how liability underwriters set their premiums.
- Identify how liability claims are handled.

# Intermediate Reinsurance


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group. This course covers the key elements of reinsurance methods and practices, including the application of facultative and treaty business and the considerations made when transacting reinsurance and underwriting proportional and non-proportional treaties.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

Anyone who wishes to widen their technical knowledge on reinsurance.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- Proportional reinsurance.
- Non-proportional reinsurance.
- Liability.

## Learning Outcomes

By the end of the course the delegates will have:


- Knowledge of current reinsurance methods and practices.
- Gained an understanding and technical knowledge – through detailed study with a leading market practitioner – of the major types of reinsurance.


# Intermediate Professional Indemnity Insurance


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group. This workshop provides a thorough overview of professional indemnity insurance.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

This course has been designed for delegates with previous involvement in professional indemnity insurance and who wish to extend their knowledge. Anyone selling PI cover should consider this course, unless a specialist in this field.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- The duty of care owed by professionals – legal liability and breach of contract.
- Examples of professional negligence claims.
- Differing professional exposures.
- Professional indemnity and errors and omissions policy – key elements of cover.
- Principal exclusion.
- The principal extensions.
- The proposal and underwriting process – how an underwriter uses the details provided to rate the risk.
- The claims process, including incident reporting and PI protocols.

## Learning Outcomes

By the end of the course the delegates will be able to:


- Outline the different types of cover which may apply to different types of professions.
- Describe the information required to obtain a professional indemnity insurance quotation.
- Outline the principal underwriting considerations which apply when underwriting professional indemnity insurance.
- Explain the important points to remember when dealing with a professional negligence claim.
- Describe how brokers should handle the current professional indemnity insurance market and what they should be telling their customers.


# Advanced EL/Products Liability


## Description


This interactive course is designed to develop knowledge and skills in this specialist topic. The course provides expert insight and builds in real-life examples and practical application to bring the subject to life wherever possible. The duration of each course is typically one day, but this can be tailored to the needs of your group. In this workshop we develop and update delegates' knowledge of liability insurance.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

Those who have an understanding of the principle of insurance, together with a grounding in products and general liability.

## Learning Objectives

The course takes a practical and thought-provoking look at:

- Recent changes in case law and statute.
- The types of liability coverage.
- Review liability policy wordings.

## Learning Outcomes

By the end of the course the delegates will be able to:


- Review and update customers on recent changes in case law and statute which might impact their liability exposures.
- Advise a range of clients on the types of liability coverage they require to protect themselves against their liabilities including employers' liability, public liability, products liability, professional indemnity, management liability, cyber liability, motor and environmental impairment liability.
- Ensure that clients have appropriate limits of indemnity.
- Ensure that liability coverage dovetails appropriately and there are no gaps in coverage.
- Review liability policy wordings to ensure they include appropriately worded and clear policy extensions.
- Advise clients on what support they will require in the event of a large liability claim.


# Personal Taxation – Refresher Workshop


## Description


This one-day workshop will sharpen up your knowledge of personal tax, utilising a range of visual aids, interactive exercises and support materials to help you deal with advice opportunities.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

### Who should attend?

Those looking to:

- Refresh the knowledge and application skills as a Financial Adviser/Paraplanner at Chartered (level 6).
- Fulfil a client focused structured CPD session of seven hours.

## Learning Outcomes

By the end of the course the delegates will have covered:


- Income tax
  - Steps to calculate income tax.
  - Use of allowances
  - SRB, PSA and DA and others.
  - Adjusted net income victims and planning ideas.
  - Calculating liabilities and identifying planning points to reduce tax.
  - Investment bond taxation
- CGT
  - Calculation exercise to review process.
  - Exemptions and reliefs
  - Disposing of businesses.
- Inheritance tax
  - Two doors – establishing all the figures to calculate the IHT liability.
  - Nil rate bands.
  - Exemptions and reliefs.
  - Lifetime gifting and life cover.
- Planned changes to the tax rates and allowances.


# Pensions – Refresher on Rules and Regulations


## Description


This one-day workshop will provide a detailed overview of pensions, utilising a range of visual aids, interactive exercises and support materials to help you deal with advice opportunities.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

### Who should attend?

Those looking to:

- Refresh the knowledge and application skills as a Financial Adviser/Paraplanner at Chartered (level 6)
- Fulfil a client focused structured CPD session of seven hours

## Learning Outcomes

By the end of the course the delegates will have covered:

- Money in: Annual Allowance (AA) and tax relief
  - Tax relief – limits and how claimed.
  - AA ground rules – DC and DB schemes
  - Tapered AA.
  - Carry forward.
  - Planning ideas to maximise contributions.
  - AA charge and how to minimise or avoid it.
- Day to day pension management
  - Reviewing less common pension products.
  - Death benefits.
  - Income options.
- Money out: Lifetime Allowance (LTA)
  - LTA ground rules.
  - Calculating LTA values in different client scenarios.
  - Protection regimes.
  - Trivial pensions/small pots.
- Planned changes to Pensions.



## Business and Leadership Courses

Enhance your management, leadership and skills to optimise your personal performance, lead your team effectively and strengthen your business.




# Application and Implementation of New Technologies in Insurance


## Description


This course will explore the use of data and the application of new technologies such as artificial intelligence and blockchain in insurance. The course will explain the concept of data and big data and how it can be used in an insurance context to derive valuable insights for the purpose of pricing, underwriting, or settling and managing claims.


This course will focus on the practical applications of blockchain technologies and artificial intelligence in the insurance value chain and explore existing use cases. It will also detail the tools needed to develop new use cases that are versatile and adaptive to developing customer needs.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

### Who should attend?

- C-level, senior management/executives and managers in insurance and reinsurance across all business areas.
- Service providers to the insurance industry.
- Brokers, agents and other intermediaries who wish to have a better understanding of data, data analytics, AI and the insurtech landscape.
- First-line and second-line employees of insurance companies working in claims, underwriting, pricing and customer services.

## Learning Outcomes

By the end of this course delegates will have a basic understanding of:

- The concept of data.
- The meaning of big data and its characteristics.
- Structured and unstructured data.
- Limitations of data.
- Data governance.
- Big data analytics.
- Different levels of analytics,
- The meaning of artificial intelligence.
- The advent of AI.
- Machine learning and its components.
- Deep learning and its components.
- Opportunities of AI in insurance.
- Blockchain technologies.
- The limitations of these new technologies.
- Applications and use cases in insurance.

# Application and Implementation of New Technologies for Claims Management


## Description


When writing an insurance policy, an insurer is effectively making a promise to the policyholder that, in the event where a loss event occurs that the insured is protected for under the policy, the insurer will pay out the claim.


Simply put, an insurance company collects premiums and settles claims on behalf of its policyholders. Consequently, one of its key drivers of profitability depends on how the insurer settles its claims, the speed of its claim settlement process or how easy its claims process is. With the ever-increasing advancements in technology, the claim function of an insurance company has evolved.


This course introduces the current advancements in technologies used in managing claims. The course will look at different aspects of the claim process which could be automated using technology and gives the participant an idea of how data and technology can support in reserving.

## Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

## Who should attend?

- C-level, senior management/executives and managers in insurance and reinsurance across all business areas.
- Service providers to the insurance industry.
- Brokers, agents and other intermediaries who wish to have a better understanding of data, data analytics, AI and the insurtech landscape.
- First-line and second-line employees of insurance companies working in claims, underwriting, pricing and customer services.

## Learning Outcomes

By the end of this course delegates will have a basic understanding of:

- Conversational interfaces and their uses cases in the claims-handling process.
- How appropriate use of technology will speed up the assessment of damage and faster settlement of claims.
- Risk calculation and assessment using telematics data.
- Areas where blockchain can support claims handling and fraud detection.
- Claims quantification using data analytics and artificial intelligence.
- Limitations of these new technologies.

# Building a World Class Advisory Practice Training Programme

## Description

Financial advice business leaders face multiple calls on their time and resources and they have many roles to fulfil, especially if advising clients while leading a team. This programme is specifically aimed at helping those business owners and leaders by creating some space to focus on growing and developing their business with structured and practical support.

This interactive training programme, developed between the CII and Elephants Child, incorporates a variety of techniques which aim to deliver increased strength and value in a UK advisory business in a regulated market environment.


The programme is interactive and engaging with a distinct outcome for each participant. It will provide a clear methodology to grow business value and includes a completed business plan for each business that incorporates a three-year strategic plan and one-year action plans. These plans are working documents that will not only provide a clear pathway to business growth but can also be used to evidence best practice, for example with potential lenders, funders, buyers and meeting the FCA requirement for regulated businesses to be able to evidence professional and prudential business management.


Building a World Class Advisory Practice that can maximise:


- Clarity and opportunity.
- Profitability.
- Efficiency, scalability and stability.
- New client acquisition.
- New asset acquisition.
- Professional connections.
- Exit value.


Implementing the T-shaped Professional Practice Model, originally conceived to help accountants develop their business management and organisational skills, we have developed a model specifically for the financial advisory sector. This model seeks to capture boundary crossing competencies that utilises the professional and technical skills required to deliver competently professional financial advice alongside the entrepreneurial and business skills required to deliver this advice at a profit.

## Summary

 **Duration:** 5 days over a 4-week period

 **No of Attendees:** 12–16

 **Format:** Face to Face

 **CPD:** Recognised

## Who should attend?

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive. Our range of Business and Leadership courses are designed to equip you with skills to optimise your personal performance, lead your team effectively and strengthen your business.

## Learning Objectives

The sessions are broken down into the below categories:

### Session 1 – Face to Face

- Introduction
- Culture
- Self-Assessment – internal/external

### Session 2 – Face to Face

- Growth Strategies
- Business Performance
- Financial Management

### Session 3 – Face to Face

- Influencing Relationships
- Transferrable Skills
- SME Market & Professional Connections
- Introduction to Planning

### Session 4 – Face to Face

- Building your Three-Year Strategic Plan
- Building your Annual Action Plan

### Session 5 – Online

- 121 Virtual Review Session (2hrs)
- Review Strategic & Action Plan

### **Optional Ongoing Review – Virtual Coaching Support (1 year)\***

- Monthly/quarterly support
- Business valuations (beginning/end)
- Actions & Performance Review
- KPI Reporting

# Consumer Duty – Action Planning Workshop

## Description

The new Consumer Duty sets higher and clearer standards of consumer protection across financial services, and requires firms to put their customers' needs first.

This one-day, highly interactive workshop aims to develop a practical understanding and foundation plan for the actions required to deliver effective and efficient outcomes in line with the Consumer Duty expectations.


What are the Consumer Duty Rules:

- A new Consumer Principle that requires firms to act to deliver good outcomes for retail customers.
- Cross-cutting rules providing greater clarity on our expectations under the new Principle and helping firms interpret the four outcomes (see below).
- Rules relating to the four outcomes we want to see under the Consumer Duty. These represent key elements of the firm-consumer relationship which are instrumental in helping to drive good outcomes for customers.


These outcomes relate to:


- products and services;
- price and value;
- consumer understanding; and
- consumer support

## Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

## Who should attend?

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive. Our range of Business and Leadership courses are designed to equip you with skills to optimise your personal performance, lead your team effectively and strengthen your business.

## Learning Outcomes

By the end of this course delegates will be able to:

- Identify the key areas for Consumer Duty compliance.
- Identify the key actions within these areas.
- Explain the rationale behind the action planning in terms of consumer benefit and regulatory interest.
- Ensure their plans are refined to improve the likelihood of success.
- Plan their own in-house activity to deliver better consumer outcomes.


# Data Driven Decision Making


## Description


The ability to analyse and manage data and information can lead to increased competitiveness, innovation, productivity and customer satisfaction. However, with data and information volumes increasing at unprecedented levels, the ability to interpret, use, and harness 'big data' can become both an organisational and a strategic leadership challenge.


The aim of this module is to equip strategic leaders with an understanding of the purpose and practices of interpreting, managing and presenting business data and information to inform effective decision making. This module will also explore the impact of legal frameworks and ethical considerations that impact the collection and use of data.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

### Who should attend?

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive. Our range of Business and Leadership courses are designed to equip you with skills to optimise your personal performance, lead your team effectively and strengthen your business.

## Learning Outcomes

By the end of this course delegates will be able to:

- Analyse the use of data and information in decision making.
- Examine different types of data and information, its value and how it can be used for more effective decision making.
- Explore the impact of legal frameworks and ethical consideration on the use of data and information in decision making.
- Discuss the impact of stakeholder needs on the collection, analysis and interpretation of data and information.
- Discuss criteria used for selection of valid, reliable and accurate data and information.
- Evaluate the use of tools and techniques for analysing and interpreting data and information to support decision making.
- Practice analysing data and information to making effective decisions.
- Review best practices and methods of presenting data and information for maximum impact.

# Enterprise Risk Management & Corporate Governance

## Description

*“The long-term success of a company is dependent on the sustainability of its business model and its management of risk.”*

FRC Guidance on Board Effectiveness, 2018

Risk management is not a veneer on corporate governance. Neither is it just risk avoidance nor risk removal. Business strategy and risk management go hand in hand and inform each other to produce intelligent understanding of the types and level of risk that an organisation will face or chooses to accept. Done well, it generates firm-wide acceptance to reduce the probability of both predictable and unforeseen events that could cause damage and minimise that damage if events do occur.


Regulators will codify much of what constitutes good risk management, as the EU Solvency II regime does. Equally, regulatory regimes often evolve from corporate governance. An executive director has a dual role: accountability for your part of the business, and leadership and direction of the company. As a director, your obligations and liabilities will be defined under law, but the board’s collective duties and responsibilities are set out by corporate governance codes with guidance that explains the collective board expectations.

There is also a growing body of research and evidence that indicates where board failure has been at the heart of company failures. More importantly it shows us what an effective board looks like, and how it relies on the effective contribution of each and every director: executive or non-executive.


The course covers the following:


- The nature and sources of risk: risk as part of strategy.
- Risk universe and classes/types of risk,
- The board’s role: setting policy, strategy, and appetites, with meaningful appetites, thresholds and tolerances.
- Risk framework and process: identification, quantification, mitigation, and monitoring.
- What is corporate governance?
- The role and duties of directors: fiduciary duty.
- The board: role, structure, leadership, and operation.
- Regulatory: aligning individual accountability with collective responsibility.
- 'Matters Reserved' business model, culture and strategy, risk framework and risk appetites.
- The element of board effectiveness: essential dynamics, relationships, behaviours, and competences.

## Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

## Who should attend?

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive. Our range of Business and Leadership courses are designed to equip you with skills to optimise your personal performance, lead your team effectively and strengthen your business.

## Learning Outcomes

By the end of this course delegates will be able to:

- Summarise the basic principles of risk management, and the board’s specific responsibilities.
- Describe the fundamental framework, process, and tools of risk management.
- Outline the essential combination of risk management, governance and capital adequacy.
- Summarise corporate governance, and how the existing framework in the UK has evolved.
- Explain your statutory and legal obligations.



- Explore the purpose and role of the board, its structure, and the roles of board committees.
- Explore the dual role of the executive director and the relationship with NEDs.
- Outline what contributes to board effectiveness.


# ESG Practice & Reporting


## Description


Environmental Social Governance (ESG) is more than just ticking boxes. It's about making a difference for your business and our world. Creating sustained outcomes that drive value and fuel growth, whilst strengthening our environment and societies.


The aim of this module is to equip leaders with an in-depth understanding of ESG, its evolving importance to all of our key stakeholders and the growing influence it has on the continued success of our business activities. Leaders will consider each of the three pillars of ESG, reflecting on current and emerging trends before learning how to create an effective ESG strategy to implement ESG practice and reporting in an insurance organisation.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

### Who should attend?

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive. Our range of Business and Leadership courses are designed to equip you with skills to optimise your personal performance, lead your team effectively and strengthen your business.

## Learning Outcomes

By the end of this course delegates will be able to:

- Explain ESG, its origins, background, and history.
- Understand the three individual Environmental, Social and Governance pillars in detail.
- Explore current and emerging ESG trends and statistics.
- Understand how key stakeholders influence the importance of and our approach to ESG.
- Analyse the business risks, challenges and opportunities associated with implementing, or failing to implement a successful ESG Strategy.
- Identify what strong ESG looks like, including strategic focus, best practices and measuring impact.
- Learn how to create an effective ESG strategy for the whole business, including;
  - identifying ESG risk;
  - setting ESG goals and priorities;
  - choosing performance metrics;
  - developing quality improvement plans; and
  - implementing robust governance practices.
- Identify effective reporting for strategic decision making, external stakeholders and regulators.


# Leading & Managing Organisational Change

## Description


Leaders must be able to navigate an organisation through strategic change. This will optimise an organisation's ability to remain competitive, react to the needs and expectations of stakeholders and respond to changing national and international markets. Despite this, many strategic leaders are ill-equipped to deliver organisational change. In fact, research conducted by Mckinsey & Company has shown that 70% of change programmes fail to achieve their goals, largely due to employee resistance and a lack of management support.


The aim of this module is for leaders to understand the scope, context and complexity of leading strategic change. Leaders will understand how the application of analytical techniques, theories and models of change, and creative problem-solving can be used to equip them to lead strategic change with confidence. The module culminates in giving leaders the opportunity to develop a proposal to lead a strategic change.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

### Who should attend?

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive. Our range of Business and Leadership courses are designed to equip you with skills to optimise your personal performance, lead your team effectively and strengthen your business.

## Learning Outcomes

By the end of this course delegates will be able to:

- Discuss the scope, context and drivers for organisational change.
- Examine the potential impact of change in organisations.
- Critically appraise the complexities of leading strategic change
- Analyse the role of leadership in gaining the commitment of others to change.
- Identify and engage with stakeholders critical to achieving success.
- Examine theories and models for leading and managing strategic change.
- Develop a proposal for leading strategic change, including:
  - creation of a change plan;
  - selection of project management tools to manage change, risk and stakeholders.
  - practical methods of supporting individuals through change; and
  - methods of monitoring and evaluating progress and success.
- Reflect on how different approaches to leadership can be applied to deliver the strategy for change.

# Managers as Coaches

## Description

***Coaching is an essential tool for leaders in achieving business goals***


In an increasingly complex and challenging world of work, coaching skills are widely regarded as essential tools for managers wanting to unleash the potential of their teams. Effective coaching drives employee engagement and performance, directly supporting the achievement of business results.

This programme developed between the CII and Better Manager focuses on developing and practicing fundamental coaching skills for managers to support team development.


**Managers as Coaches** is an **8-week program**, which includes 4 x 90-minute virtual tutor-led sessions, which can help participants practice and master the 'coaching skills mindset' most associated with effective leadership.


At the end of the course, you will receive a certificate of attendance from the CII.

### Summary

 **Duration:** 8 weeks

 **No of Attendees:** 12–16

 **Format:** Virtual delivery

 **CPD:** Recognised

### Who should attend?

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive. Our range of Business and Leadership courses are designed to equip you with skills to optimise your personal performance, lead your team effectively and strengthen your business.

## Learning Objectives

The programme is broken down into four sections:

### 1. INTRODUCTION TO COACHING – WHY IS THIS IMPORTANT?

Inside this session, participants will:

- Identify key connections between coaching and management effectiveness.
- Outline benefits and impact of skillful coaching for managers and team members.
- Explore techniques to enhance listening skills.
- Observe and practice coaching technique to ensure back-to-work readiness in applying technique.

### 2. TACTICAL COACHING SKILLS – BUILDING YOUR COACHING TOOLBOX

Inside this session, participants will:

- Explore fundamental coaching principles to enhance their people management skills.
- Develop three new powerful coaching techniques designed to enhance communication skills through coaching conversations.
- Observe and practice coaching techniques to ensure back-to-work readiness in applying techniques.

### **3. LEVERAGING COACHING SKILLS FOR PERFORMANCE MANAGEMENT**

Inside this session, participants will:

- Discover how to initiate and engage in meaningful conversations that establish expectations, cultivate accountability and champion team members.
- Develop three new powerful coaching techniques designed to further enhance communication skills.
- Observe and practice coaching techniques to ensure back-to-work readiness in applying techniques.

### **4. LEVERAGING COACHING FOR ENGAGEMENT**

Inside this session, participants will:

- Discover coaching techniques designed to unlock engagement and productivity.
- Develop new coaching technique designed to cultivate personal growth and development.
- Bring it all together through coaching practice to ensure back-to-work readiness in applying all coaching methods.

## **Learning Outcomes**

By the end of this course delegates will gain the following:


- An objective assessment of their individual manager strengths and development areas.
- The advanced listening skills most commonly adopted by high-performing leaders.
- A toolkit of coaching techniques suitable for any working environment.
- Improved communication skills.
- Mastery of impactful career development/growth conversations with team members.

# Managing & Leading Teams To Achieve Success


## Description


When individuals and teams are managed well, organisations thrive and staff satisfaction increases. This workshop provides an in-depth understanding of key theoretical and practical approaches to leading and managing teams effectively. Managers will identify the techniques used to monitor and manage individual and team performance, assess current and future requirements for their teams and identify approaches to close gaps and drive results that exceed expectations.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

### Who should attend?

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive. Our range of Business and Leadership courses are designed to equip you with skills to optimise your personal performance, lead your team effectively and strengthen your business.

## Learning Outcomes

By the end of this course delegates will be able to:

- Discuss the management and leadership concept.
- Explore how management and leadership practice has evolved, discussing what lessons from the past we should keep and which practices are now outdated.
- Assess how theoretical models can be applied to different contexts and situations.
- Identify practical approaches for effective team management and leadership.
- Examine the current and future requirements of individuals and teams
- Evaluate methods of monitoring and managing team performance.
- Discuss how to develop team capabilities to close performance gaps and drive results.
- Assess strategies for enabling and maintaining a high-performance team.


# Managing Projects to Achieve Results


## Description


An ever-developing field used to achieve strategic objectives, project management is used by organisations large and small alike to improve process efficiency, implement new technologies, launch new products/services and tackle ongoing operational issues and risk. With such an important role to play in organisational success, the ability to manage projects has become a vital skill for all managers.


This two-day workshop focuses on the knowledge and skills required to manage projects successfully and overcome problems and challenges. Managers will learn how to win support for a strategic project they need to run, the proven methods and tools for planning tasks and activities and develop the skills they require to implement and manage the project itself. In addition, the workshop approaches how to build key stakeholder relationships, as well as monitoring progress and reporting on project outcomes.

### Summary

 **Duration:** 2-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

### Who should attend?

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## Learning Outcomes

By the end of this course delegates will be able to:

- Discuss project management's role in delivering organisational strategic objectives.
- Know how to use a business case to win support for a strategic project.
- Assess the process for initiating projects.
- Learn the tools and techniques to plan and manage projects in different contexts and situations.
- Analyse who the key stakeholders are in relation to a project and the techniques used to work collaboratively with them to achieve project objectives.
- Identify risks that could lead to project failure and know how to mitigate or manage them.
- Explore methods for monitoring progress and reporting project outcomes.
- Know how to close a project, including project evaluation, lessons learned and the redistribution of resources and projects teams.

# Managing Risk


## Description


The ability to effectively lead strategic risk management is essential to safeguard an organisation's prosperity and reputation. Ultimately, leaders must know how to develop and lead risk management in a manner that not only reacts to organisational needs but contributes to organisational success.


The aim of this module is for leaders to develop an in-depth understanding of strategic risk management. Leaders will critically appraise strategic risk within an organisational context.


They will assess strategies for risk management and the leadership skills to lead risk initiatives successfully. Ultimately, leaders will be given the opportunity to develop a framework to deliver a risk strategy in an organisational context.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

### Who should attend?

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## Learning Outcomes

By the end of this course delegates will be able to:

- Critically appraise strategic risk to an organisation, its customers and stakeholders.
- Discuss the governance of risk within organisations.
- Examine categories of risk used within different organisational contexts.
- Explore strategies for managing risk in an organisation, including: processes for identifying, assessing and ranking business risk; the process for managing a business risk; approaches to mitigate business risk; methods for implementing business risk management; and methods for reporting identified risks to stakeholders.
- Critically appraise the leadership skills for strategic risk management.
- Propose a risk management framework to deliver strategic objectives.



# Performance Measures & KPIs in the Insurance Industry

## Description

*"What gets measured, gets done"*

Anon

*"If you can't measure what's important, you make what you can count important"*

James Willbank, US Army Advisor, Vietnam, 1965

Performance measurement is a fundamental activity for any business: part of governance and part of risk management, but you need to measure the right things if you want an effective 'Executive dashboard'.


We are in a financial business so we need to understand the core financial measures, which means we need to revise the industry financial dynamics and budget process so we understand the activities that generate the numbers in the first place, and what the measures will tell us about health of the business. The most important is profit – which is also the most difficult because of the issue of timing: when do you recognise 'profit'...? This is especially true of long term/life business.

A business should identify both lagging and leading key performance indicators: it's not enough to know where you have come from, you need indicators of the likely direction of travel. Whilst insurance concentrates on financial and other quantitative indicators, we should be ready to look beyond the numbers.


This course covers the following:


- The insurance 'positive' cash flow cycle.
- The mechanics: premium (written v. earned), reinsurance, claims, acquisition costs and management expenses.
- Net or gross?
- Setting the targets: the budgeting process.
- Interpreting the profit and loss/income statement and balance sheet.
- How and when profit is recognised in life and non-life?
- The key ratios: RoI/RoC/RoE, the combined ratio, ultimate loss ratio, operating ratios, solvency capital margin.
- For a life business, what is embedded value and what does it tell us?
- Key performance indicators and key risk indicators.
- The 'non-financial' indicators of conduct and culture: leading indicators. What else would you consider?

## Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

## Who should attend?

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## Learning Outcomes

By the end of this course delegates will be able to:

- Describe the financial characteristics and cash flow cycle that make insurance unique.
- Explain the financial treatment of insurance assets and liabilities.
- Navigate the main financial statements.
- Summarise the basic budgeting process: the source of your KPIs.
- Describe the key insurance ratios and their use.
- Outline the other key performance indicators an insurer can employ.


# Quality Management & Continuous Improvement

## Description


Effective quality management is critical to meeting stakeholder needs and expectations, developing trust and reputation. It impacts on profitability, processes and procedures and the achievement of strategic objectives. Quality is not something that occurs by chance. It is reliant on strategic and operational planning and the commitment and drive by professional managers, leaders, teams and individuals to make it a success.


The aim of this unit is to enable professional managers and leaders to understand the rationale and approaches to quality management. Critically, the workshop focuses on how quality and continuous improvement can be instilled into all aspects of working practice.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

### Who should attend?

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## Learning Outcomes

By the end of this course delegates will be able to:





- Evaluate the scope and purpose of quality management within organisations.
- Analyse organisational structures for managing quality.
- Examine the influence of stakeholders in quality management.
- Analyse the impact of quality management systems on an organisation's activities.
- Discuss how quality management can be developed to achieve strategic objectives in an organisational context.
- Evaluate the tools and techniques used in quality management within an organisational setting.
- Develop a proposal to lead quality management at an operational level.
- Consider how individuals and teams can be supported to instil the principles of quality and continuous improvement into all aspects of working practice.

# Reinsurance, Insurance & Climate Change and the Future of Insurance

## Description

This module is split into three sections. The first section introduces delegates to the basics of reinsurance. We will then take a look at climate change and the ramifications of climate change for insurers and then we will look at the future of insurance and the growing use of insurtech in relation to insurance placement and claims handling.

### Summary

-  **Duration:** 1-day workshop
-  **No of Attendees:** 12–16
-  **Format:** Virtual delivery/Face to Face
-  **CPD:** Recognised

### Who should attend?

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## Introduction to Reinsurance

The first part of the module gives an overview of the part reinsurance plays and why it is important. Delegates will also be introduced to the types of reinsurance that can be purchased and how each reinsurance type operates.

This section covers the following:

- Why is reinsurance important?
- The reinsurance market.
- Proportional and non-proportional reinsurance.
- The characteristics of facultative and treaty reinsurance.
- Aggregate excess of loss.
- Stop loss.
- Underwriting and rating considerations.
- The legal principles of reinsurance.

## Learning Outcomes

By the end of this section delegates will be able to:

- Understand the need for reinsurance and its use by insurers.
- Have a basic understanding of the reinsurance market.
- Demonstrate the difference between proportional and non-proportional reinsurance.
- Have an understanding of the characteristics of facultative, treaty and contract methods of reinsurance.
- Have a basic understanding of the legal principles of reinsurance and the importance of information about the original risk to the underwriter.

## Insurance and Climate Change

This module looks at climate change and the implications for insurers and their clients.

This section covers the following:

- The impact of climate change.
- Climate change and risk management.
- Climate change initiatives.
- Climate change risk finance.
- The UK insurance regulators' expectations.
- The effect of climate change for insurers and their clients.

### Learning Outcomes

By the end of this section delegates will be able to:

- Understand the impact of climate change for insurance organisations and policyholders.
- Understand climate change and catastrophe.
- Have a basic understanding of climate change risk management.
- Have an understanding of climate change initiatives.
- Have a basic understanding climate change and risk finance.
- Have a basic understanding of the UK regulators' expectations of insurers.
- Understand the effects of climate change with insurance organisations.
- Understand the effects of climate change on insurance clients.

## The future of Insurance

The last part of this module looks at the latest technological advances relating to insurance.

This section covers the following:

- What is AI and machine learning?
- The use of big data.
- Insurance claim automation.
- The use of AI and property risk.
- The application of insurtech in regard to claims handling.
- New opportunities.

### Learning Outcomes

By the end of this section delegates will be able to:

- Understand the future of insurance.
- Understand AI and its place in the assessment of risk.
- Understand insurance automation in regard to the claims process.
- Have an understanding of the future of big data.
- Have a basic understanding of insurtech in relation to climate change.
- Understand how insurtech is disrupting the insurance market.


# Strategic Approaches To Equality, Diversity & Inclusion

## Description


There is a moral, financial and legal business case for excellent practice in equality, diversity and inclusion in an organisational context. Ensuring it is led effectively at a strategic level requires knowledge, understanding, skills, behaviours and tenacity to keep pace with the momentum of change. Strategically, equality, diversity and inclusion matters. An understanding of the topic not only impacts on the success of strategic objectives but it mitigates risk and enables a culture of support and wellbeing to thrive.


The aim of this module is to enable leaders to develop an in-depth understanding of equality, diversity and inclusion at a strategic level. Leaders will have the opportunity to critically assess structural inequality within an organisational and societal context. They will discuss approaches to comply with legal and good practice requirements and to appraise the influence of equality, diversity and inclusion on strategic objectives.

### Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

### Who should attend?

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive. Our range of Business and Leadership courses are designed to equip you with skills to optimise your personal performance, lead your team effectively and strengthen your business.

## Learning Outcomes

By the end of this course delegates will be able to:

- Assess structural inequality within an organisational and societal context.
- Discuss approaches to legal and good practice requirements for equality, diversity and inclusion in an organisational context.
- Critically appraise the influence of equality, diversity and inclusion on the strategic objectives of an organisation.
- Present the business case for good practice in equality, diversity and inclusion.
- Analyse the role and responsibilities of strategic leaders and managers in relation to equality, diversity and inclusion.
- Select and appraise data and information to inform strategic priorities of an organisation.
- Develop strategic priorities for equality, diversity and inclusion within an organisational context.
- Develop a strategy to embed strategic priorities for equality, diversity and inclusion within an organisation.
- Assess approaches for managing individuals and teams which lack commitment to equality, diversity and inclusion.

# Strategic Management & Planning

## Description

*“An effective board establishes a sustainable business model and a clear strategy consistent with it”*

PRA Corporate Governance and Board Responsibilities


A clear and articulated business model, well thought out strategy and robust governance are not just regulatory 'box ticking exercises' but a commercial imperative regardless of industry. This module introduces the business model, strategy creation and business planning.


In insurance this is often an underdeveloped skill: often never learned before you have to do it for real as a board director, and then learning 'on the job'. This module offers the fundamental processes and stages as a spine from which hang the practical 'doing'. The best practice is neither scientific nor formulaic but, whatever approach is chosen, this can be the starting point.


The module covers the following:


- The planning process: business model to strategy to business plan.
- Strategic decision making.
- The process of strategy.
- Strategic analysis: internal and external.
- Risk considerations and risk appetite alignment.
- Objectives, key performance indicators and critical success factors.
- Preparing a structured business plan which recognises the needs of all the stakeholders and the current business model.
- Regulatory climate: conduct, governance and culture.
- Handling uncertainty and contingency planning.
- Diversification, innovation, mergers and acquisitions.
- Implementing the business plan.
- Developing a business plan.
- Launching a business plan.
- Monitoring and managing the causes of strategic drift.

## Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

## Who should attend?

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive. Our range of Business and Leadership courses are designed to equip you with skills to optimise your personal performance, lead your team effectively and strengthen your business.

## Learning Outcomes

By the end of this course delegates will be able to:

- Explain the vital role of the business model and its link with strategy creation.
- Apply the process of strategy creation and strategic analysis.
- Identify external and internal factors affecting strategy, and assess business risk.
- Outline the strategic options available to businesses, e.g. mergers/acquisitions/networks.
- Describe the importance of business planning and the key components of a business plan.
- Outline the process for launching and monitoring a business plan.

# Transformational Leadership & Cultural Change


## Description


The role of the 21<sup>st</sup>-century leader is to provide clear and compelling direction which empowers the team and encourages engagement and team cohesion in order to meet targets, deadlines and organisational expectations. This can only be achieved by leaders who are highly emotionally intelligent and who understand and are committed to the skills and techniques required to get the best from themselves and their team. Whilst leadership could be described as an art rather than a list of things to do, the ability to trust others and be trustworthy is high up on the list of attributes. Before the role of leadership can be explored, the subject of organisational culture will be defined and discussed along with how the organisational culture can define how leaders operate and how change is managed at a process and people level.


This course covers the following:


- Organisational culture and how culture defines leadership.
- Mission and vision statements – the benefits and purpose.
- The role and function of the 21<sup>st</sup>-century leader.
- Incisive and ethical leadership.
- Leading and managing change.
- Using proven models to effectively lead organisational change.
- Strategies for communicating and supporting people through change.

## Summary

 **Duration:** 1-day workshop

 **No of Attendees:** 12–16

 **Format:** Virtual delivery/Face to Face

 **CPD:** Recognised

## Who should attend?

Managers, team leaders and all those seeking to expand their skills on the topic. Wherever you are on your career journey, developing and maintaining your personal and professional skills helps to ensure you continue to grow and thrive. Our range of Business and Leadership courses are designed to equip you with skills to optimise your personal performance, lead your team effectively and strengthen your business.

## Learning Outcomes

By the end of this course delegates will be able to:

- Describe what organisational culture is.
- Create a mission and vision statement for their organisation.
- Understand how context impacts 21st-century leadership.
- Describe inclusive and ethical leadership.
- Explain what organisational change is and why change often fails.
- Describe the key change and transformational models and techniques.






Chartered Insurance Institute  
3rd Floor, 20 Fenchurch Street,  
London, EC3M 3BY

tel: +44 (0)20 8989 8464

business.enquiries@cii.co.uk  
cii.co.uk

 Chartered Insurance Institute

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