



Phyllis Van Wyhe Returns To Ohio with Quality CE in 2010

Substantiation Frustration 9:00 - 12:00 3 Credits

At the time of loss, an insured can easily get frustrated with the substantiation requirements. You should have prepared them for what would be required. Explore the three primary areas where substantiation is required. Discover why advance planning is gaining new emphasis in the wake of recent disasters. Learn the coverages that require less substantiation and should be used whenever possible. Don't send your insured into a claim unprepared. Write it right and then make recommendations for accumulating the documentation that will be required at the time of a property claim.

It's Not Good Service; It's E&O 1:00 - 4:00 3 Credits

The insured has responsibilities – both legal and ethical – in the insurance transaction, but it is up to the agent to enforce them. Explore the five primary obligations of the insured and the legal basis of each. Discover the types of E&O claims that arise when the agent does too much for the client. Learn pointers for giving valuable service without increasing your obligations. Learn to set boundaries and get the insured to respect them. The agent who does too much for a client, increases their E&O exposure.

Aug 16-Salem
Salem Comm Ctr

Aug 17-Canton
Comfort Inn Belden Village

Aug 18-Middlebg Hts
Comfort Inn Airport

Aug 20-Perrysbg
Holiday Inn Exp

Competing with the Internet

9:00 – 12:00 3 Credits

The Internet is here to stay and has made the insurance marketplace more competitive. New sites are popping up every day and many of them are competing with the traditional agency. Explore the elements of the Progressive advantage. Evaluate the challenges and successes of agents who buy Internet-generated leads. Predict the impact Internet sales will have on commercial lines. Discover the marketing advantages of social networking and the three principles to apply. Pick up pointers for holding your own in the face of this new, growing competition.

Developing a Client-Focused Approach 1:00 – 4:00 3 Credits

Ethics is taking others into consideration. The agent who goes a step further and develops a client-focused approach meets less resistance from both prospects and clients and finds it easier to develop trust-based relationships. Develop a new approach for gathering the information to quote or handling a review. Learn the power of tough love and how to turn them down without turning them off. Discover the reciprocity of advocacy that will lead to more referrals. Learn to deepen your career rewards – both monetary and intangible – when you focus on the client in ways that really count.

Nov 15-Salem
Salem Comm Ctr

Nov 16-Canton
Comfort Inn Belden Village

Nov 17-Middlebg Hts
Comfort Inn Airport

Nov 19-Perrysbg
Holiday Inn Express

\$59 half day, \$118 full day

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Questions?

Call Angela at 800-326-4741

Name: _____ **Nat Prod #:** _____

Email: _____

Date: _____ **AM/PM/Both:** _____

Agency: _____

Address: _____

City: _____ **State:** _____ **Zip:** _____

Tele: _____ **Fax:** _____

Send check or charge to MC _____ **Visa** _____

Card No. _____ **Exp Date:** _____

Signature: _____