



2022/2023 IBAM EDUCATION

SYLLABUS & COURSE CALENDAR



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Note: Program courses, CECs, pricing and dates are subject to change at any time. All courses are offered on a first come first serve availability and will be subject to sufficient enrollment numbers. For finalized information on any course and to register for any of our offerings, visit the IBAM website at www.ibam.mb.ca/education

2022 / 2023 Course Calendar Snapshot

June 2022

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
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26	27	28	29	30		

13	Fundamentals Exam / Online Exam Proctoring
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July 2022

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10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

6	CAIB / CPIB Exam
11	Fundamentals Exam / Online Exam Proctoring
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August 2022

S	M	T	W	T	F	S
	1	2	3	4	5	6
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14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30	31			

8	Fundamentals Exam / Online Exam Proctoring
22-26	Fundamentals of Insurance Immersion- Page 15
29	Fundamentals of Insurance Immersion Exam - Page 15
31	YBN-IBAM Dale Rempel Memorial Golf Tournament

September 2022

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
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7	CAIB / CPIB Exam
12	Fundamentals Exam / Online Exam Proctoring
13-16	IWS Immersion - Page 15
12-16	CAIB 2 Immersion - Page 17
19	CAIB 2 Immersion Exam - Page 17
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26	CAIB 3 Immersion Exam - Page 17
29	CSIP: Module 1 - Page 13

October 2022

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2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	24	25	26	27	28	29
30	31					

3-7	CAIB 4 Immersion - Page 17
11	CAIB 4 Immersion Exam- Page 17
3	Fundamentals Exam / Online Exam Proctoring
11	Building Construction 101 - Page 8
17-21	Fundamentals of Insurance Immersion - Page 15
24	Fundamentals of Insurance Immersion Exam - Page 15
27	CSIP: Module 2 - Page 13

2022 / 2023 Course Calendar Snapshot

November 2022

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		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

1	Auxiliary Heat- From Woodstoves to Wood Furnaces- Page 8
2	GSCL Module 1 - Intro to Comml Risk Assessment - Page 8
9	Errors & Omissions Webinar - Page 6
14	Fundamentals Exam / Online Exam Proctoring
15-18	IWS Immersion - Page 15
24	CSIP: Module 3 - Page 13

December 2022

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				1	2	3
4	5	6	7	8	9	10
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18	19	20	21	22	23	24
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2	GSCL Module 2- Intro to Comml Risk Assessment- Page 9
5-9	Fundamentals of Insurance Immersion - Page 15
7	CAIB / CPIB Exam
12	Fundamentals Exam / Online Exam Proctoring
12	Fundamentals of Insurance Immersion Exam - Page 15

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29	30	31				

9	Fundamentals Exam / Online Exam Proctoring
9-13	CAIB 2 Immersion - Page 17
10-13	IWS Immersion - Page 15
11	Crime and Fidelity Insurance - Page 10
16	CAIB 2 Immersion Exam - Page 17
16-20	CAIB 3 Immersion - Page 17
23	CAIB 3 Immersion Exam - Page 17
26	GSCL Module 3 - Intro to Comml Property Wordings- Page 9
27	CSIP: Module 4 - Page 13

February 2023

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2	Specialty Coverage - Personal Lines - Page 10
6	CAIB 4 Immersion Exam - Page 17
8	CAIB / CPIB Exam
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13	Fundamentals of Insurance Immersion Exam - Page 15
13	Fundamentals Exam / Online Exam Proctoring
23	GSCL Module 4 - Intro to Comml Liability and the CGL Policy
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March 2023

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5	6	7	8	9	10	11
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7	Introduction to Farm Insurance - Page 11
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9	Residential Plumbing & Electrical - An Ins. Perspective - P.11
13	Fundamentals Exam / Online Exam Proctoring
16	Manufactured Homes and Trailers - Page 12
24	CSIP: Module 2- Page 13
27-31	Fundamentals of Insurance Immersion - Page 15

2022 / 2023 Course Calendar Snapshot

April 2023

S	M	T	W	T	F	S
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2	3	4	5	6	7	8
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3	Fundamentals of Insurance Immersion Exam - Page 15
5	Insuring Secondary and Seasonal Homes- Page 12
10	Fundamentals Exam / Online Exam Proctoring
28	CSIP: Module 3- Page 14

May 2023

S	M	T	W	T	F	S
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21	22	23	24	25	26	27
28	29	30	31			

2	Introduction to Umbrella Insurance - Page 12
8	Fundamentals Exam / Online Exam Proctoring
9	Ins. Solutions for Residential Condo Unit Owners- Page 12
9-12	IWS Immersion - Page 15
10	CAIB / CPIB Exam
26	CSIP: Module 4 - Page 13

June 2023

S	M	T	W	T	F	S
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11	12	13	14	15	16	17
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12-16	Fundamentals of Insurance Immersion - Page 15
12	Fundamentals Exam / Online Exam Proctoring
19	Fundamentals of Insurance Immersion Exam - Page 15

July 2023

S	M	T	W	T	F	S
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5	CAIB / CPIB Exam
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11-14	IWS Immersion - Page 15

August 2023

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14	Fundamentals Exam / Online Exam Proctoring
14-18	Fundamentals of Insurance Immersion - Page 15
21	Fundamentals of Insurance Immersion Exam - Page 15

Sept	
6	CAIB / CPIB Exam - Page 17
11	Fundamentals Exam / Online Exam Proctoring
12-15	IWS Immersion - Page 15

Continuing Education Seminars / Webinars

We continually develop educational sessions that touch on everything from specific industry issues to general business topics. We have a great vantage point of the industry as a whole - our job is to keep you informed and at the top of your game by providing quality seminars at every level.

With COVID-19 being felt throughout all areas of our lives, considerable effort has been made to ensure a safe delivery model for education to our brokers. Many of the courses and exams in this catalogue have been moved to a virtual delivery method have had their in-person arrangement altered to adhere to evolving safety guidelines.

Our facilitators are some of the best in the business. They range from active brokers chosen for their expertise on a specific topic to insurance company personnel and independent consultants. All of our facilitators are dedicated to providing quality education. Let us know if facilitating is something you have always wanted to do.

Errors & Omissions Loss Control Webinar

Understanding your exposures to Errors & Omissions claims as a Broker is key to developing your operations strategy.

During this seminar, you will examine what clients expect of you, what courts expect of you, and what others expect of you.

It is during the discussions that you will be able to answer the questions you need to answer in order to establish the procedures that best suit your brokerage.

Objectives

This seminar will examine those expectations and review some methods to address your exposures. You will:

- Review the duty of care required by professionals
- Examine sources of claims and claim trends as a learning tool
- Gain understanding of the need for consistency in procedures
- Learn of some tools and actions to assist in controlling your exposures
- Insight into how social media can expose your brokerage to a possible E&O Situation

Recommended for

All brokerage staff wishing to minimize their exposure to Errors & Omission incidents.

IBAM members who are insured through the Association's E&O Program and, who meet the requirements for representation, will earn a 10% credit on their annual premium after they attend this seminar and remain loss free.

Date

Virtual - November 9, 2022

Time

9:00 am - 1:00 pm

Cost

\$150 per member

\$185 per non-member

Facilitator

Katrina Hueging

Accreditation

3 General ICM CE Credits / 3 GICS CE Credits

IBAM Loss Control Seminar Discount

Available to IBAM members only, this seminar provides qualifying brokerages a 10% premium credit on your next renewal under the members' Errors & Omissions Program, which is required every three years. See table below for qualifying criteria.

A - Seminar Attendance Requirements:

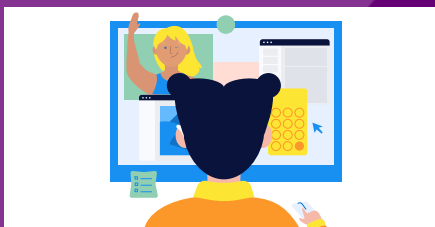
Brokerage Staff Size	Number Required	Position in Brokerage
1 to 4	1	Active Agency Principal, Owner, Partner or Officer
5 to 11	3	1 Active Agency Principal, Owner, Partner, or Officer AND Any 2 additional combinations of Producers or CSR's
12+	25 % of Staff But no more than a max of 15 employees	1 Active Agency Principal, Owner, Partner, or Officer AND Any combination of Active Agency Principal, Owner, Partner, Officer, Operations Manager, Producer, or CSR's until number required reached

B - No claims are made against the Insured in each of the three policy periods following attendance at the seminar.

C - 1) If there are no claims made against the Insured during the three year "Risk Management credit" term, the Insured may re-qualify for credit by attending another seminar during the third year of the "Risk Management credit" term and prior to the policy period expiration date. Insureds must meet the risk management criteria every 3 years.

2) If a claim is made against the Insured during any of the three years of the "Risk Management" term the credit will be lost at the next policy anniversary date. The Insured may re-qualify by attending a seminar during the policy period for which the credit is lost, provided there are no additional claims made during the policy period. However, the risk management credit will not be applied to any renewal for the year in which the claim was made. If any additional claims are made, the Insured must wait an additional year before he is eligible to re-qualify for the credit.

For more information on IBAM's Online Courses as well as upcoming Webinars and Seminars, contact:



Kate Murray
Professional Development and Education
kate@ibam.mb.ca
204-488-1857 Ext. 3

Online Educational Webinars

We are continually developing new webinars that touch on relevant and timely topics industry-wide. Learn from the comfort of your own office environment.

If you are looking for something specific or an offering that had been available previously, we can tailor webinars to your brokerage needs. Let us know what you are looking for.

Building Construction 101

Building Construction 101 is designed to put the pieces of the construction types and insurance industry puzzle together. Don't let the name "101" fool you – participants are calling this session a master's course because of the vast and valuable information included. This half-day session breaks down the complexity of the construction types and the underwriting complexity around each type. You will engage in learning activities that will enable you to fully understand the five categories (Types 1-5), ranging from the stoutest of construction to that which will most likely fail rapidly when under fire conditions.

Date
October 11, 2022

Time
9:30 am - 11:45 am

Cost
\$30 per member
\$150 per non-member

Facilitator
Melanie Needham, MRD Training & Consulting Inc.

Accreditation
2 General ICM or GICS CE Credits

Auxiliary Heat- From Woodstoves to Wood Furnaces

How a person heats their home is an important consideration in deciding whether to insure a risk and the premium charged. Homeowners may choose to use something to supplement their primary heat source during regular heating season - such as a fireplace, wood burner, space or electric heaters, or solar heating. These items are auxiliary heat sources, and they bring with.

Date
November 1, 2022

Time
9:30 am - 11:45 am

Cost
\$30 per member
\$150 per non-member

Facilitator
Melanie Needham, MRD Training & Consulting Inc.

Accreditation
2 General ICM or GICS CE Credits

Getting Started in Commercial Lines Module 1 - Intro to Commercial Risk Assessment

The ability to identify exposures to financial loss faced by business owners is an essential skill for insurance professionals involved in the commercial lines side of the business.

Topics covered during this module include:

- ✓ Introduction to Risk Management
- ✓ Assessing Commercial Property and Liability Exposures
- ✓ Methods of Risk Assessment and Analysis
- ✓ Using the CSIO Commercial Application Form
- ✓ Risk Assessment Case Study

Date
Part 1 - November 02, 2022
Part 2 - December 02, 2022
Part 3 - January 26, 2023
Part 4 - February 23, 2023

Time
1:30 pm - 3:45 pm

Cost
\$30 per member
\$150 per non-member

Facilitator
Jo Anne Mitchell, CIP, Effective Training Communications Plus

Accreditation
8 General ICM or GICS CECs (for attending all sessions - 2 CECs each)

GSCL Module 2 - Introduction to Commercial Building Construction & Property Protection Systems

Many building particulars are needed when writing and / or renewing commercial property policies. Gathering this information requires a basic knowledge of commercial building construction and a keen eye for detail. We will also touch on insuring commercial buildings to value.

Topics covered during this module include:

- ✓ C.O.P.E.
- ✓ Construction of the building (walls, roof)
- ✓ Occupancy of the building by the applicant and by other businesses in the same building
- ✓ Protection systems (fire and crime)
- ✓ Exposure to loss presented by neighboring businesses

Date

Part 2 - December 02, 2022
Part 3 - January 26, 2023
Part 4 - February 23, 2023

Time

1:30 pm - 3:45 pm

Cost

\$30 per member
\$150 per non-member

Facilitator

Jo Anne Mitchell, CIP, Effective Training Communications Plus

Accreditation

8 General ICM or GICS CECs (for attending all sessions - 2 CECs each)

GSCL Module 3 - Introduction to Commercial Property Wordings

Join this webinar to build knowledge of the coverages and key exclusions under the most commonly used commercial property wording, the Commercial Building, Equipment and Stock. This wording forms the basis of most commercial package policies and can also be used for non-package risks.

Topics covered during this module include:

- ✓ Introduction to the CBES form
- ✓ Coverages, exclusions and extensions
- ✓ Tenant Improvements
- ✓ Equipment Breakdown Basics
- ✓ Commonly used commercial endorsements and floaters
- ✓ How a commercial package policy is structured

Date

Part 3 - January 26, 2023
Part 4 - February 23, 2023

Time

1:30 pm - 3:45 pm

Cost

\$30 per member
\$150 per non-member

Facilitator

Jo Anne Mitchell, CIP, Effective Training Communications Plus

Accreditation

8 General ICM or GICS CECs (for attending all sessions - 2 CECs each)

GSCL Module 4 - Introduction to commercial liability

All businesses are exposed to the risk of a claim for third party injury. Loss control measures together with liability insurance can help reduce the financial consequences of a third-party lawsuit.

Topics covered during this module include:

- ✓ Consequences of a liability loss to commercial lines clients
- ✓ Using risk management, disclaimers and waivers
- ✓ Introduction to the CGL Policy - coverage and exclusions

Date

Part 4 - February 23, 2023

Time

1:30 pm - 3:45 pm

Cost

\$30 per member
\$150 per non-member

Facilitator

Jo Anne Mitchell, CIP, Effective Training Communications Plus

Accreditation

8 General ICM or GICS CECs (for attending all sessions - 2 CECs each)

Crime & Fidelity Insurance

Workplace crime can be disruptive to daily operations, and can have devastating impact on a company and its bottom line. It's crucial to help your clients protect their businesses from the threat of crime by employees and outsiders. In this webinar, you'll take a good look at all crime and fidelity coverages including: employee theft or forgery/alteration, theft, robbery and burglary (inside the premises), theft and robbery (outside the premises), fraudulent money orders and counterfeiting, and the 3D Policy.

Date

January 11, 2023

Time

9:30 am - 11:45 am

Cost

\$30 per member

\$150 per non-member

Facilitator

Melanie Needham, MRD Training & Consulting Inc.

Accreditation

2 General ICM or GICS CECs

Specialty Coverage - Personal Lines

This program is a great snap shot of all the important personal lines coverage that gets missed on a regular basis. We will cover topics such as Home Sharing, Vacant Properties, Buildings Under Construction, Equipment Breakdown Coverage.

Date

February 2, 2023

Time

9:30 am - 11:45 am

Cost

\$30 per member

\$150 per non-member

Facilitator

Melanie Needham, MRD Training & Consulting Inc.

Accreditation

2 General ICM or GICS CECs

Cyber Liability

With the ever-increasing threat of a data breach, cyber liability insurance needs to be an integral part of your client's daily business. The misconception that Cyber Liability is just for big companies needs to be broken as this coverage can make the difference between staying in business or shutting down after an attack.

Cyber liability insurance can protect your business not only from threats such as hackers, lost or stolen laptops, business interruption, but also a long list of other threats that can leave a lasting impact on your business.

In this seminar you will learn what threats companies are facing and how to mitigate that risk. We will discuss potential claims with real life examples, things to look for in coverage as well as the litigation side of things. This seminar is for all insurance professionals.

Date

February 28, 2023

Time

9:30 am - 11:45 am

Cost

\$30 per member

\$150 per non-member

Facilitator

Melanie Needham, MRD Training & Consulting Inc.

Accreditation

2 General ICM or GICS CE Credits



Introduction to Farm Insurance

The basics of farm insurance starting from the personal and business exposures including standard coverages and an exploration of unique coverages and wording for specific classes.

Date

March 07, 2023

Time

9:30 am - 11:45 am

Cost

\$30 per member

\$150 per non-member

Facilitator

Melanie Needham, MRD Training & Consulting Inc.

Accreditation

2 General ICM or GICS CE Credits



Residential Plumbing & Electrical - An Insurance Perspective

Everything has a shelf life, even houses. As a dwellings ages, so do it's plumbing and electrical systems. Many insurers will not provide or renew coverage on older dwellings unless these critical components are updated. Your clients will want to know why!

Following this webinar participants will understand the exposures to loss presented by older plumbing & electrical systems and be able to explain the insurance concerns associated with these critical components including:

- Residential water lines (old and new)
- Sump pumps and back-up valves
- Aluminum wiring and the reasons why it can present a fire hazard
- How knob & tube wiring differs from modern day wiring and why it must be updated
- Potential issues when a home has only a 60-amp electrical panel

Participants will also gain the knowledge and skills needed to perform their front-line underwriting duties.

Date

March 09, 2023

Time

1:30 pm - 3:45 pm

Cost

\$30 per member

\$150 per non-member

Facilitator

Jo Anne Mitchell, CIP, Effective Training Communications Plus

Accreditation

2 General ICM or GICS CE Credits

Manufactured Homes and Trailers

Trailers, Mobile Homes, Manufactured Homes, Modular Homes...the list goes on and on. Join us for this webinar to finally understand the differences in all the different models, unique exposures to each, coverage available and the current industry trends.

Date

March 16, 2023

Time

9:30 am - 11:45 am

Cost

\$30 per member

\$150 per non-member

Facilitator

Melanie Needham, MRD Training & Consulting Inc.

Accreditation

2 General ICM or GICS CE Credits

Insuring Secondary and Seasonal Homes

Many policyholders have been captivated by the lure of owning a cottage for seasonal use or as a secondary residence. These homes range from a shack in the woods to large modern dwellings. These homes range from a shack in the woods to large modern dwellings. As an insurance professional your challenge is to identify the risks associated with the various types of properties and to find the right insurance solution. Join us for this half day interactive seminar to increase your Seasonal and Secondary Home expertise.

Date

April 05, 2023

Time

9:30 am - 11:45 am

Cost

\$30 per member

\$150 per non-member

Facilitator

Melanie Needham, MRD Training & Consulting Inc.

Accreditation

2 General ICM or GICS CE Credits

Introduction to Umbrella Insurance

The Introduction to Umbrella Insurance seminar is addressed to all industry professionals who want to learn the essentials of this coverage. We begin with an overview of what the coverage entails. We will discuss who needs the coverage, what is included in the coverage and how to underwrite an application. We will discuss how to understand all of the aspects and common underwriting flags to look for. Both Personal and Commercial lines will be addressed.

Date

May 02, 2023

Time

9:30 am - 11:45 am

Cost

\$30 per member

\$150 per non-member

Facilitator

Melanie Needham, MRD Training & Consulting Inc.

Accreditation

2 General ICM or GICS CE Credits

Ins. Solutions for Residential Condo Unit Owners

Are you prepared to answer these commonly asked client questions?

- Do I need to insure my kitchen and bathroom fixtures?
- Why do I need condo insurance - I thought my monthly condo fee pays for insurance?
- Why do I need sewer back up coverage? I live on the 19th floor!
- I don't need to buy condo insurance if I am renting it out, right?
- Our condo property manager says we must have insurance to cover the building deductible - is that true?
- We just bought a bare land condo - what type of insurance do I need?

Join us for this information packed webinar to learn that answers to these questions and to build your knowledge of residential condominiums and the associated insurance solutions.

Date

May 9, 2023

Time

1:30pm - 3:45 pm

Cost

\$30 per member

\$150 per non-member

Facilitator

Jo Anne Mitchell, CIP, Effective Training Communications Plus

Accreditation

2 General ICM or GICS CE Credits

The Customer Service for the Insurance Professional Program (CSIP)

As a customer service representative, your ability to deliver excellent service to your clients is critical to your brokerage's success. In this four-part program, you will explore every aspect of brokerage operations from a customer service perspective. You will develop the skills required to ensure that your office maintains a consistent, high quality, customer service approach in all market conditions. The Customer Service for the Insurance Professional program is an excellent resource, whether you are new to the insurance brokerage field or a seasoned professional.

Program Overview

The Customer Service for the Insurance Professional program is different from other programs in that there are no examinations to write. You will receive a certificate of completion once verification is received from your mentor or course facilitator.

You will explore the following topics:

The Role of the Insurance Broker

- Understanding the Broker's Role
- Quality Service and its Benefits
- Client Expectations
- Effective Communications

Adding Value to your Brokerage

- Selling Skills
- Client Negotiation
- Public Relations
- Time Management
- Brokerage Operations

Office procedures and brokerage workflows and their impact on:

- Client Service
- E&O Liability Exposure
- Office Efficiency
- Industry Issues

The Broker and the Law

- Inadequate Coverage
- Industry Organization
- Career Development

CSIP Workshop

All four modules are taught over the course of a 4-month period consisting of a day long Webinar for each module.

Dates*

Module 1 - Pt 1: Sep 29, 2022 & Feb 24, 2023

Module 2 - Pt 1: Oct 27, 2022 & Mar 24, 2023

Module 3 - Pt 1: Nov 24, 2022 & Apr 28, 2023

Module 4 - Pt 1: Jan 27, 2023 & May 26, 2023

*subject to change

Time

9:00pm - 3:00pm

Cost

\$250 per Module for members

\$300 per Module for non-members

Facilitator

Rhonda Kachurowski, CIP, CAIB

Accreditation

6 General ICM CEC's per module

CSIP Correspondence

This format allows you to work at your own pace with the assistance of a mentor (i.e. manager or owner) from your brokerage. At the end of each module, there is a summary and review of the text including multiple choice and short answer questions.

Registration of this format is ongoing. Your mentor will send a letter stating that you have satisfied the requirements for each of the modules before a certificate can be issued.

Dates

Ongoing

Cost

\$165.00 per Module for members

\$195.00 per Module for non-members

Accreditation

6 General ICM CEC's per module

(Student)

4 General ICM CEC's per module (Mentor)



Fundamentals of Insurance Program

Fundamentals of Insurance is an approved pre-licensing course, and successful completion satisfies the education requirement for a Level 1 license. This level of license authorizes the license holder to sell, inside but not outside the office of a general insurance brokerage and under the supervision of the holder of a Level 2 license, every category of insurance including accident and sickness insurance (excluding life insurance).

We offer this course in two formats:

Facilitated Study:

- 5-day in class sessions with a facilitator
- Textbook (for each phase)
- 1 exam attempt during final class
- Option to add IWS Certification

Self-directed:

- Textbook
- 1 exam attempt within six months of registration

Facilitated Study:

Fundamentals of Insurance (FOI) with IWS Certification is a complete licensing and training solution for Manitoba Brokers. While our distinguished CAIB designation upon completion provides the opportunity to secure a level 3 license, the FOI course quickly provides the opportunity to gain a level 1 license with IWS Certification.

Phase 1 - Fundamentals of Insurance

Available on its own or in conjunction with Phases 2 & 3. This session will include training from a qualified facilitator to assist an individual new to the industry in passing the FOI exam as well as notes and quizzes to help prepare students for the exam. Courses are held on a Monday to Friday basis with the exam being conducted by IBAM on the following Monday. Successful completion allows a person to apply for a Level 1 General Insurance License.

Phase 2 - IWS Tutorial

Any brokers who wish to sell Autopac products on behalf of MPI must be qualified to do so by MPI. Before training can be taken on the business rules and policies of the Autopac program, brokers must complete online training of the Insurance Work Station (IWS) by the Friday before phase 3 begins. This training can be done wherever a person has Internet access once their employing / sponsoring brokerage has signed them up for access to the IWS system. This Internet based training can take anywhere from 6 to 12 hours depending on the person's previous knowledge of insurance. Successful completion allows a person to attend the Phase 3 training.

Phase 3 - MPI Training

Through 3 days of online instruction, brokers will finalize the training required by MPI to sell the Autopac Products. Students successfully completing and passing the MPI Autopac Exam will now be certified to sell MPI products once they attain an insurance license from the Insurance Council Of Manitoba.

Looking for additional assistance studying for the Fundamentals of Insurance Exam?

Visit the IBAM website for information about our new Supplemental Study Guide available for purchase.

Guide includes additional explanation on terms, worksheets, quizzes, practice exams and more!

Cost

Full Program: \$850.00

Phase 1 Only: \$640.00

Phase 3 Only: \$325.00

Note - Phase 1 only can be purchased if the student does not require the Phase 2 & 3 IWS Training or cannot find a sponsor. No refunds are provided if a student is denied entry to the Phase 3 class as they did not complete all of their Phase 2 Online Tutorial requirements in time.

Self-Directed:

An individual can register for the self-directed Fundamentals Course at any time. Once the registration is processed, the individual will have 6 months to write the exam which they must register for 2 weeks before the exam date (if writing out of town - Brandon, The Pas, Dauphin, Thompson or Flin Flon) or 1 week if writing in Winnipeg. Subject to availability.

Exam Dates*:

June 13, 2022

July 11, 2022

August 8, 2022

September 12, 2022

October 3, 2022

November 14, 2022

December 12, 2022

January 9, 2023

February 13, 2023

March 13, 2023

April 10, 2023

May 8, 2023

June 12, 2023

July 10, 2023

August 14, 2023

September 11, 2023

Cost

\$325.00

**Students may also register for rewrites on any of the prescribed exam dates at a cost of \$125.00 per attempt. Exams cannot be attempted more than 3 times in a 6 month period.*

Online exams are now available which allows students to write any day they like with an approved proctor. Please see the IBAM website for more details.

2022/2023 Semester Schedule

Fundamentals with IWS Immersion

Dates:

Phase 1: June 20 - 24, 2022

Phase 3: July 12-15, 2022

Exam: Jun 27, 2022

Phase 1: August 22 - 26, 2022

Phase 3: September 12 - 16, 2022

Exam: Aug 29, 2022

Phase 1: October 17-21, 2022

Phase 3: November 15-18, 2022

Exam: Oct 24, 2022

Phase 1: December 5-9, 2022

Phase 3: January 10-13, 2023

Exam: Dec 12, 2022

Phase 1: February 6-10, 2023

Phase 3: March 7-10, 2023

Exam: Feb 13, 2023

Phase 1: March 27-31, 2023

Phase 3: May 9 - 12, 2023

Exam: Apr 3, 2023

Phase 1: June 12-16, 2023

Phase 3: July 11-14, 2023

Exam: Jun 19, 2023

Phase 1: August 14-18, 2023

Phase 3: September 12-15, 2023

Exam: Aug 21, 2023

Time

Phase 1: Monday to Friday - 9am - 4:30pm with the exam the following Monday morning (9am to 12pm)

Phase 3: Tuesday to Thursday - 9am - 4:30pm



The Canadian Accredited Insurance Broker Program

Increase your business competence, confidence and credibility as an insurance professional with the Canadian Accredited Insurance Broker program.

To establish yourself as a trusted insurance advisor, you need to have in-depth knowledge and understanding of all aspects of property and casualty insurance. You need the CAIB program. You will immerse yourself in the study of Personal Lines, Commercial Lines and Brokerage Management. Each course in this four-course program culminates in a national examination. Upon successful completion, eligible candidates are awarded the nationally recognized professional designation CAIB.

The Qualifications

Graduates' use of the CAIB designation, as with all IBAC designations, will be restricted to licensed Property and Casualty insurance brokers who are members of their provincial or regional brokers' association. Non-members are welcome to take the CAIB program and will receive a Certificate of Completion upon graduation.

Program Outline

The topics covered in the four CAIB courses include:

CAIB 1 - General Insurance

- Introduction to General Insurance
- Habitational Insurance
- Personal Liability Insurance
- Farm Insurance
- Basic Personal Auto Insurance
- Building Professionalism
- Travel Insurance

CAIB 2 - Commercial Insurance

- Introduction to Commercial Property
- Commercial Property Insurance - Policy Forms
- Commercial Property Insurance - Additional Coverage Forms
- Commercial Property Insurance - Miscellaneous Property Forms
- Crime Insurance
- Business Interruption Insurance

CAIB 3 - Commercial Insurance

- Commercial General Liability - A Legal Perspective
- Commercial General Liability Insurance Policy
- Commercial Automobile Exposure
- Ocean Marine and Aviation Insurance
- Surety Bonds
- Risk Management

CAIB 4 - Brokerage Management

- Planning
- Organizing
- Human Resources
- Leading
- Broker/Insurance Company Relations
- Marketing
- Building Long-Term Relationships
- Technology
- Financial Management
- Monitoring

Benefits in attaining your CAIB designation:

- *Provides you with formal fundamental insurance knowledge*
- *Earn confidence from clients*
- *Encourages you to develop specialized skills*
- *Offers career advancement opportunities*
- *Achieve personal goals*

The CAIB Program has been designed to address the varied insurance knowledge required for brokers whether they come from a personal lines, commercial lines or a management background.

2022/2023 Semester Schedule

CAIB 5-Day Immersion **Online Classes**

This is a 5-day instructor led virtual course where you can participate in an intensive week of discussions, hands on exercises and practice exams. The exam will be written on first Monday online after the 5 days of training have concluded. This platform is suited best if you need to focus on the subject matter at hand without work or personal distractions.

All classes are held via an online platform Monday to Friday with the exam held on the following Monday online.

CAIB 2

September 12 - 16 (exam September 19)
January 9 - 13 (exam January 16)

CAIB 3

September 19 - 23 (exam September 26)
January 16 - 20 (exam January 23)

CAIB 4

October 3 - October 7 (exam October 11)
January 30 - February 3 (exam February 6)

Time

8:30am - 4:30pm

Cost

\$900 members
\$1350 non-members

Facilitator

Wayne Vokey (CAIB 2 & 3) / Debbie Pearson (CAIB 4)

CAIB Discussion Group **Online Classes**

This format emphasizes active participation through a 10 week learning platform where students meet in the evening virtually with a facilitator to review the course material leading to the next exam date.

Fall Semester classes run from September until December, exam December 7. Winter Semester classes run from February until May, exam May 10. Exact start dates TBA

CAIB 1 - Wednesday Evenings

CAIB 2 - Thursday Evenings

CAIB 3 - Monday Evenings

CAIB 4 - Tuesday Evenings

Time

6:30pm - 8:30pm

Cost

\$650 members
\$950 non-members

Facilitator

Various

CAIB Self-Study

This platform was created if you prefer to set your own pace and organize your own study schedules. You also can get access to additional online resources to assist in your preparation for the upcoming exam.

Exam Dates

July 6, 2022
September 7, 2022
December 7, 2022
February 8, 2023
May 10, 2023
July 5, 2023
September 6, 2023
(for registration deadlines, please refer to the IBAM website)

Cost

\$630 members
\$900 non-members

CAIB Licensing Levels

Successful completion of CAIB 1 qualifies a student to apply for a Manitoba Level 1 General License

Successful completion of CAIB 2 & 3 qualifies a student to apply for a Manitoba Level 2 General License

Successful completion of CAIB 4 as well as 2 years as a Manitoba Level 2 General Licenses broker qualifies a student to apply for a Manitoba Level 3 General License.

Canadian Professional Insurance Broker

The property and casualty insurance industry is constantly changing, with new demands and challenges arising on an ongoing basis. You need to meet these demands and challenges with confidence that can only be gained from experience and knowledge. You already have both, so why not take the next logical step in your insurance career with the Canadian Professional Insurance Broker (CPIB) program. All you need to qualify for admission is the CAIB or CIP designation.

CPIB is unique in that it allows you to focus your studies and interests in one of three professional streams: Personal Lines, Commercial Lines and Brokerage Management.

Program Overview

Earning the CPIB designation requires completion of six courses in your chosen stream, specifically three courses that are mandatory and insurance specific and three of a broader nature and offered by recognized universities or colleges. You may also take the program's courses individually for general interest or Continuing Education (CE) credits.

Use of the CPIB designation, as with all IBAC designations, will be restricted to licensed property and casualty insurance brokers who are members or associate members of their provincial or regional brokers association. Non-members are welcome to take the CPIB program and will receive a Certificate of Completion upon graduation.

The Qualifications

You must be, at the time of registering for the examinations, employed by a property and casualty insurance brokerage that is a member in good standing of a member association that is and continues to be a member of IBAC. The right to use and maintain the CPIB designation shall only continue if membership status is maintained.

Program Courses

You must complete 6 courses (3 mandatory and 3 elective) in your stream of specialization in order to obtain the designation.

Mandatory Courses offered by IBAM via Self-Study:

Personal Lines	Commercial Lines	Broker Management
<ul style="list-style-type: none">• Law & Ethics• Claims Management & Administration• Advances Personal Lines	<ul style="list-style-type: none">• Law & Ethics• Claims Management & Administration• Advances Commercial Lines	<ul style="list-style-type: none">• Law & Ethics• Claims Management & Administration• Business Strategy

Elective Courses offered by a Post-Secondary Institution (3 required):

<ul style="list-style-type: none">• Accounting / Finance• Marketing• Sales Management• Communications• Business Administration• Organizational Behaviour	<ul style="list-style-type: none">• Accounting / Finance• Marketing• Sales Management• Communications• Business Administration• Risk Management• Organizational Behaviour	<ul style="list-style-type: none">• Management Accounting• Marketing• Human Resources• Sales Management• Communications• Business Finance• Organizational Behaviour• Management Information Systems (MIS)
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Course Outline:



Advanced Personal Lines

Take your knowledge of personal lines learned in the CAIB program and expand on it to prepare you to deal with the more complex issues that face insurance brokers like you on a daily basis. Topics include beyond the personal liability policy; dealing with exceptional homes; other residences; valuations; home-based businesses; fraud; unlicensed vehicles; sales and promotion.



Advanced Commercial Lines

Take your knowledge of commercial lines learned in the CAIB program and expand that to prepare yourself to deal with more complex issues that you face on a daily basis. Topics include Commercial Property, Liability, Miscellaneous Coverages, Financial Analysis, Financial Applications, Emerging Coverages, Risk Management, Proposals and Presentations, Sales, and Account Management.



Law and Ethics

Law and Ethics are applied to the needs of the Canadian insurance broker in this advanced course. Topics include business law; ethical principles and issues; personal and organizational ethics; insurance brokers as professionals at common law; developing a risk management strategy for professional liability; corporate law; insurance broker and its business contracts; e-commerce, privacy rights, legislation and practice; employment contracts; employment relationship and termination.



Claims Management and Administration

Take an advanced look at the claims process from the perspective of an insurance broker. Topics include the claims process; responsibilities and rights of the insurer; the brokerage and claims management; claims by assignees and third parties; recent developments and future directions.



Business Strategies

This advanced course will assist brokerage managers to integrate what they have learned in prior courses on the various functional areas of managing a brokerage. Topics include Strategic Leadership, Financial Management, Human Resources, Inside the Brokerage, Sales & Service, Marketing Strategies, Strategic Communication, and Growth, Valuation & Perpetuation.

Cost
\$530 members
\$820 non-members

Program Format
Self-Study

Exam Dates
July 6, 2022
September 7, 2022
December 7, 2022
February 8, 2023
May 10, 2023
July 5, 2023
September 6, 2023

*(for registration deadlines,
please refer to the IBAM
website)*



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