



2026/2027

IBAM Education

SYLLABUS & COURSE CALENDAR

2026 IBAM AFFINITY PARTNERS



IBAM TECH CENTRE

A free resource for IBAM members.

Check out our TechTalk webinars, browse our tech Affinity Partners and gain access to IBAC's Tech Website. Must be an IBAM member to access.



Table of Contents

2026/2027 Course Calendar	4
Errors and Omissions Webinar	8
Online Educational Webinars	10
Auto Broker Technical Course	15
Fundamentals of Insurance	16
National Programs - CAIB	18
National Programs - CSIP	21
National Programs - CPIB	22

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.

2026/2027 Course Calendar Snapshot

September 2026

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	25	26
27	28	29	30			

- 8 Fundamentals Exam Proctoring
- 9 ***FINAL*** Paper CAIB/ CPIB Exam seating
- 14-18 Fundamentals of Insurance Immersion
- 21 Fundamentals of Insurance Immersion Exam
- 21-25 CAIB 2 Immersion
- 28 CAIB 2 Immersion Exam
- 29 WEBINAR: Equipment Breakdown

October 2026

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
25	26	27	28	29	30	31

- 5-9 CAIB 3 Immersion
- 6-9 IWS Immersion
- 8 WEBINAR: Introduction to Construction Insurance
- 13 CAIB 3 Immersion Exam
- 13 Fundamentals Exam Proctoring
- 14 ***NEW***: Monthly CAIB/ CPIB Exam Proctoring
- 26-30 CAIB 1 Immersion
- 29 WEBINAR: Insurance Solutions for Residential Condominium Unit Owners

November 2026

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	25	26	27	28
29	30					

- 2 CAIB 1 Exam
- 2-6 CAIB 4 Immersion
- 9 CAIB 4 Exam
- 9 Fundamentals Exam Proctoring
- 10 CAIB/ CPIB Exam Proctoring
- 12 WEBINAR: Errors & Omissions Loss Control Webinar
- 16-20 Fundamentals of Insurance Immersion
- 17 WEBINAR: Residential Plumbing & Electrical - An Insurance Perspective
- 23 Fundamentals of Insurance Immersion Exam
- 24 WEBINAR: Employment Practices Liability

December 2026

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	25	26
27	28	29	30	31		

- 1-4 IWS Immersion
- 3 WEBINAR: Crime and Fidelity
- 7 Fundamentals Exam Proctoring
- 9 CAIB/ CPIB Exam Proctoring

2026/2027 Course Calendar Snapshot

January 2027

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	25	26	27	28	29	30
31						

- 11 Fundamentals Exam Proctoring
- 11-15 CAIB 2 Immersion Class
- 13 CAIB/ CPIB Exam Proctoring
- 18 CAIB 2 Immersion Class Exam
- 18-22 Fundamentals of Insurance Immersion
- 19 WEBINAR: Cyber Liability
- 21 WEBINAR: Leading with Emotional Intelligence
- 25 Fundamentals of Insurance Immersion Exam
- 25-29 CAIB 3 Immersion Class

February 2027

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	25	26	27
28						

- 1 CAIB 3 Immersion Class Exam
- 8 Fundamentals Exam Proctoring
- 8-12 CAIB 1 Immersion Class
- 23-26 IWS Immersion
- 10 CAIB/ CPIB Exam Proctoring
- 16 CAIB 1 Immersion Class Exam
- 16 WEBINAR: Water, Water, Water
- 18 WEBINAR: Time Management Essentials
- 22-26 CAIB 4 Immersion Class

March 2027

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	25	26	27
28	29	30	31			

- 1 CAIB 4 Immersion Class Exam
- 8 Fundamentals Exam Proctoring
- 10 CAIB/ CPIB Exam Proctoring
- 15-19 Fundamentals of Insurance Immersion
- 18 WEBINAR: Dealing with Workplace Conflict
- 22 Fundamentals of Insurance Immersion Exam
- 23 WEBINAR: Understanding Financial Statements

April 2027

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
25	26	27	28	29	30	

- 5 Fundamentals Exam Proctoring
- 7 CAIB/ CPIB Exam Proctoring
- 13 WEBINAR: Drones Here, Drones There, Drones Everywhere!!!
- 27-30 IWS Immersion
- TBA BROKERCON 2027!!

2026/2027 Course Calendar Snapshot

May 2027

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	25	26	27	28	29
30	31					

10-14 Fundamentals of Insurance Immersion
 17 Fundamentals of Insurance Immersion Exam
 17 Fundamentals Exam Proctoring
 18 WEBINAR: Building Construction 101
 19 CAIB/ CPIB Exam Proctoring

June 2027

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	25	36
27	28	29	30			

1-4 IWS Immersion
 7-11 CAIB 1 Immersion Class
 14 CAIB 1 Immersion Class Exam
 14 Fundamentals Exam Proctoring
 16 CAIB/ CPIB Exam Proctoring
 TBA YBN/IBAM Annual Slo-Pitch Tournament

July 2027

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
25	26	27	28	29	30	31

12 Fundamentals Exam Proctoring
 14 CAIB/ CPIB Exam Proctoring

August 2027

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	25	26	27	28
29	30	31				

9 Fundamentals Exam Proctoring
 11 CAIB/ CPIB Exam Proctoring
 TBA IBAM Annual Golf Tournament



RETURNING THIS FALL **LUNCHTIME TALK SERIES**

These sessions are a fantastic opportunity to expand your knowledge and skills, and are free for all IBAM members!

Each session covers a wide array of subjects, ensuring there's something for everyone to learn and enjoy. Plus, by participating, you can earn Continuing Education Credits (CECs) to support your professional development.

Don't miss out on this chance to learn from experts, keep an eye out this fall for session details and sign up, and take the next step in your learning journey!



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

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

Date: Virtual – November 12, 2026

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 CSRs
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 CSRs 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 – 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.

D – 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 they are eligible to re-qualify for the credit.





Online Educational Webinars

IBAM is proud to bring our members educational sessions that touch on everything from specific industry issues to general business topics. With 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. Find below our webinar offerings for 2026/27.

Life Leases

Life lease housing is a relatively new form of tenure in Canada, but a rapidly growing one that is misunderstood by the purchaser and industry. This webinar will take you through a basic understanding of the life lease terminology, the process of development, ownership issues, as well as how the industry is responding with respect to coverage.

Date: August 27, 2026

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

Equipment Breakdown

This entry-level course is for anyone who wants to learn more about the infamous Equipment Breakdown exposures. Whether it be mechanical breakdown, electrical damage, or certain types of explosions that are excluded from standard coverage forms. The Equipment Breakdown policy fills these gaps in coverage, but the form is often times a confusing one. Join Melanie as we explore covered causes of loss, covered equipment, direct damage, and indirect coverage options.

Date: September 29, 2026

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 Construction Insurance

Are looking to deepen your knowledge in construction insurance? Whether you're starting from scratch or need a refresher, this program is designed for YOU! Join us for an enlightening journey into the world of construction risks and surety bonding. Equip yourself with the knowledge that sets you apart in the industry! Don't miss out on this opportunity to elevate your skills!

Date: October 8, 2026

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

Online Educational Webinars

Insurance Solutions for Residential Condominium Unit Owners

Your client just bought a condo. Are you prepared to answer these commonly asked questions?

- Do I need to insure my kitchen and bathroom fixtures?
- Why do I need sewer back up coverage? I live on the 10th floor!
- 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: October 29, 2026

Time: 2:00 pm – 4:15 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

Residential Plumbing & Electrical - An Insurance Perspective

Everything has a shelf life, even houses. As a dwellings ages, so does 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

Date: November 17, 2026

Time: 2:00 pm – 4:15 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

Employment Practices Liability

Understanding the types of claims and coverages included in EPLI insurance has now become essential in the operation of any size business. Join us as we learn about the exposures, coverage, claims scenarios, and risk management tips, as well as a deep dive in a sample policy wording!

Date: November 24, 2026

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

Online Educational Webinars

Crime and Fidelity

In this interactive session we will cover a crime application to understand the important of the questions and why it is required, review typical coverage available in crime policy, and discuss fidelity coverage. You will then be able to put your knowledge to the test by reviewing a sample wording!

Date: December 3, 2026

Time: 2:00 pm – 4:15 pm

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

Facilitator: Melanie Needham, MRD Training & Consulting Inc.

Accreditation: 2 General ICM or GICS CE Credits

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. This seminar is for all insurance professionals.

Date: January 19, 2027

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

Water, Water, Water

This interactive session teaches you almost everything you need to know about water! We will learn basic terminology around water, floods, and coverage. Once we know the basics we will delve into the policy wording of a homeowners policy, Sewer Back-Up and Overland Water and Flood. Once we are done you will be so comfortable with the peril of water and be able to confidently explain why each coverage is required, what is covered and excluded and how to ensure your client understands the exposure.

Date: February 16, 2027

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

Online Educational Webinars

Understanding Financial Statements

Fundamentals of Financials for the professional is addressed to all positions in the insurance industry. We will cover the basics of reading and understanding financial statements, including, but not limited to, the main four financials- Income Statements, Balance Sheets, Cash Flow Statements, and Statement of Changes in Shareholder Equity – and how they're used in underwriting the risk.

Date: March 23, 2027

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

Drones Here, Drones There, Drones Everywhere!!!

Drones have been a hot topic for a long time in our industry but to many, it is still something foreign like Alf was in the '80s (you may have to google that one). But alas we have amazing products available in the marketplace and we have a handle on all the exposures these gadgets bring. So, join Melanie as we discuss the different types of drones, the exposures they bring in both personal and commercial use as well as the coverage available in the industry. And we will have a few laughs along the way!

Date: April 13, 2027

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

Building Construction 101

Building Construction 101 is one of the most important programs for all new insurance professionals. In this robust program, we will break down the important topics of construction into individual modules covering all types of building construction including earthquake resistive and green construction.

Date: May 18, 2027

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

Online Educational Webinars

Leadership Essentials Series

Join our instructor Scott Donald, as he leads a three part webinar series, focused on leadership essentials. Not only are these sessions packed full of valuable skills for supervisors, managers and brokerage leaders; but also filled with skills any broker might need in their day to day work life. Take the series as a full set or choose the sessions that are the right fit for you!

Cost per session: \$30 per member / \$150 per non-member

Facilitator: Scott Donald, SBD Growth Strategies

Accreditation per session: 2 General ICM or GICS CE Credits

Leading with Emotional Intelligence

Harness emotional intelligence to enhance your leadership. Manage your emotions, understand and influence others, and foster an emotionally intelligent workplace. Join us to learn:

- How to gain a deep understanding of your own emotions and responses, making you a more relatable leader.
- Techniques for managing and controlling your emotions in high-pressure situations.
- Ways to improve empathy and interpersonal relationships with team members, turning friction into constructive relationships.
- Strengthening emotional resilience to handle workplace challenges like a pro, ensuring you bounce back from setbacks.
- Creating an emotionally intelligent workplace culture where everyone feels valued and understood, boosting morale and productivity.

Date: January 21, 2027

Time: 9:30 am – 11:45 am

Time Management Essentials

Master time management skills to boost your productivity. Learn to track and analyze your time, prioritize tasks, and implement strategies to manage your time effectively. In this session you'll learn:

- The fundamental principles of time management, so you can stop feeling like there are never enough hours in the day.
- Signs of inefficient time use and their impact, helping you spot when you're spinning your wheels.
- Skills for tracking daily activities and analyzing how time is spent, so you can reclaim your schedule from the time bandits.
- Seven key tips for managing time effectively to reduce distractions, improve focus, and get more done in less time.

How to create personalized time management plans that fit your work habits and goals like a glove

Date: February 18, 2027

Time: 9:30 am – 11:45 am

Dealing with Workplace Conflict

Conflicts are inevitable, but they don't have to be disruptive to team performance. Identify conflict sources and learn strategies to resolve them swiftly and effectively. Learn how to:

- Recognize and understand common reasons for workplace conflicts.
- Implement clear communication and clarify roles to minimize conflicts.
- Develop leadership skills to manage and resolve conflicts constructively.

Date: March 18, 2027

Time: 9:30 am – 11:45 am



Auto Broker Technical Course

With the need to provide excellent customer service, brokers require more knowledge and expertise than ever before in the marketing of Autopac products. This program was developed to give new brokers the skills needed to provide a higher level of expertise to their auto clients than ever before.

The Auto Broker Technical Course is an approved pre-licensing course, and successful completion satisfies the education requirement for an Auto-Only License.

Phase 1 – Auto Broker Technical Course

Available on its own or in conjunction with Phases 2 & 3. Four days of an overview of auto insurance (focusing on the history, terminology and basics of this area of the business), an overview of the Insurance Council of Manitoba and a customer service component.

The course will run Monday to Thursday with an exam written on the Friday afternoon and students attaining a grade of 60% or higher will move on to the next phase of the program. Successful completion allows a person to apply for an Auto-Only Insurance License.

Phase 2 – IWS Online Tutorials via MPI

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. IWS computer assisted instruction (tutorial) leads students through a variety of Autopac transactions, screen by screen. Students who are not employed at a brokerage must secure their own placement at a brokerage for this phase of the course.

Phase 3 – Introduction to Autopac : Get IWS Certified

After completing their online tutorials in Phase 2, students may then move on to the final phase. Through 3 days of online instruction, students will complete training required to sell Autopac Products using MPI's systems. Students successfully completing and passing the MPI Autopac Exam taken at the end of Phase 3, will become certified to sell MPI products, in conjunction with the license they obtained in Phase 1, after submitting their results to the Insurance Council of Manitoba.

Self-Study:

- 1 ½ hours to complete the exam
- Pass mark: 60%
- If required, exam rewrite fee is \$90

Exam Details:

- 1 ½ hours to complete the exam
- Pass mark: 60%
- If required, exam rewrite fee is \$90

Exam Dates:

- August 10, 2026
- September 8, 2026
- October 13, 2026
- November 9, 2026
- December 7, 2026
- January 11, 2027
- February 8, 2027
- March 8, 2027
- April 5, 2027
- May 17, 2027
- June 14, 2027
- July 12, 2027
- August 9, 2027

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



Fundamentals of Insurance Program

Fundamentals of Insurance is an approved licensing course, successful completion satisfies the education requirement or 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).

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 Online Tutorials via MPI

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. IWS computer assisted instruction (tutorial) leads students through a variety of Autopac transactions, screen by screen. Students who are not employed at a brokerage must secure their own placement at a brokerage for this phase of the course.

Phase 3 – Introduction to Autopac

After completing their online tutorials in Phase 2, students may then move on to the final phase. Through 3 days of online instruction, brokers will complete training required to sell Autopac Products using MPI's systems. Students successfully completing and passing the MPI Autopac Exam taken at the end of Phase 3, will become certified to sell MPI products, in conjunction with the license they obtained in Phase 1, after submitting their results to the Insurance Council of Manitoba.

We offer this course in two formats:

Facilitated Study:

- 5-day either in class or virtual 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

Exam Dates:

- August 10, 2026
- September 8, 2026
- October 13, 2026
- November 9, 2026
- December 7, 2026
- January 11, 2027
- February 8, 2027
- March 8, 2027
- April 5, 2027
- May 10, 2027
- June 14, 2027
- July 12, 2027
- August 9, 2027

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

Fundamentals of Insurance Program

2026/2027 Semester Schedule - Fundamentals with Introduction to Autopac Immersion

Dates:

Phase 1: September 14-18, 2026	Exam: Sept 21, 2026
Phase 3: October 6-9, 2026	
Phase 1: November 16-20, 2026	Exam: Nov 23, 2026
Phase 3: December 1-4, 2026	
Phase 1: January 18-22, 2027	Exam: Jan 25, 2027
Phase 3: February 23-26, 2027	
Phase 1: March 15-19, 2027	Exam: Mar 22, 2027
Phase 3: April 27-30, 2027	
Phase 1: May 10-14, 2027	Exam: May 17, 2027
Phase 3: June 1-4, 2027	

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 with the exam on Friday morning

Cost:

Full Program: Members \$650 / Non-Members \$900
Phase 1 Only: Members \$450 / Non-Members \$700
Phase 3 Only: All Registrants \$325

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.

Cost: \$325



WORK/LIFE, BALANCED.

GET STARTED AT IBAM.MB.CA

Becoming an insurance broker can get you there.





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.

Program Outline

The topics covered in the four CAIB courses include:

CAIB 1 - General Insurance

- Purpose of and understanding Insurance Contracts
- Getting to know the insurance landscape
- Regulation of Insurance Brokers
- Canadian legal system
- Introductions to:
 - Automobile
 - Travel Medical
 - Habitational
 - Personal Liability
 - Farm Insurance.
- Underwriting and claims process

CAIB 3 - Commercial Insurance

- Business Interruption Insurance
- Crime Insurance
- Cyber Insurance
- Ocean Marine and Aviation Insurance
- Reinsurance
- Director's & Officer's Liability Insurance
- Surety Bonding
- Risk Assessment

CAIB 2 - Commercial Insurance

- Introduction to Commercial Property Insurance
- Commercial Property Insurance
 - Policy Forms
 - Exclusions
 - Additional Coverage Forms
- The Roles involved with Commercial Property Insurance
- The Law in Canada
- Commercial General Liability and Exclusions
- Commercial Automobile Insurance

CAIB 4 - Brokerage Management

- Organizing and Insurance Brokerage
- Brokerage & Insurance Company relations
- Strategic Management: Process, and Implementation
- Human Resources Management
 - Organizational Behavior
- Marketing
- Creating Long-Term Client Relationships
- Financial Management
- Technology and Brokerage Operations

Canadian Accredited Insurance Broker Program

2026/2027 CAIB Exam Schedule

September 9th is the last pen and paper exam seating for the CAIB program, After this date, paper exams will be available by request only.

While students can still elect to take the exam virtually on their own time at any location, date and time of their choice; as of October 14th 2026, IBAM will now also be offering monthly proctored seating's to students, taken on computers at the IBAM office.

Details for how to register for the New CAIB Monthly seating's will be located in the students profile under the 'My Courses' tab once they have registered for a corresponding CAIB course.

Exam Dates:

- September 9, 2026
- October 14, 2026
- November 10, 2026
- December 9, 2026
- January 13, 2027
- February 10, 2027
- March 10, 2027
- April 7, 2027
- May 12, 2027
- June 16, 2027
- July 14, 2027
- August 11, 2027

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

CAIB New Edition 1.0

The CAIB New Edition 1.0 marks an important advancement in insurance education, offering a modernized learning experience suited to the dynamic nature of the industry. This updated edition incorporates refreshed content, enhanced learning tools, and a more flexible format, ensuring that professionals are well-equipped to navigate today's complex environments.

CAIB has entered the digital age, now offering interactive online modules, e-book options and a range of other multimedia resources. Catering to the diverse learning preferences of todays learning, making the material more accessible and engaging.

Features of CAIB New Edition 1.0:

- Content integrating current industry practices, technology and client standards.
- Updated student resources featuring numerous real-world cases to reinforce learning.
- Visual diagrams designed to support comprehension and information retention.
- Content restructured from chapters into modules, making it more accessible and easier to progress through.
- For the first time, CAIB will be offered in an e-book format, enhancing accessibility and convenience
- An interactive platform that enables students to create study notes, bookmark content, search key terms, access tap-to-reveal flashcards, and work through interactive check-up quizzes.
- CAIB content will be reviewed and updated annually, ensuring content remains current, relevant, and aligned with industry changes.
- Students can now select to study using a paper textbook, a bundle consisting of the online interactive portal and an e-book version, or select an all-in package containing all three study modes.

Canadian Accredited Insurance Broker Program

2026/2027 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 1

October 26 – 30, 2026 (exam November 2, 2026)

February 8 – 12, 2027 (exam February 16, 2027)

June 7 – 11, 2027 (exam June 14, 2027)

CAIB 2

September 21 – 25, 2026 (exam September 28, 2026)

January 11 – 15, 2027 (exam January 18, 2027)

CAIB 3

October 5-9, 2026 (exam October 13, 2026)

January 25 – 29, 2027 (exam February 1, 2027)

CAIB 4

November 2 – 6, 2026 (exam November 9, 2026)

February 22 – 26, 2027 (exam March 1, 2027)

Cost:

Digital Bundle: Members \$925 / Non-Members \$1,425

Textbook Only: Members \$1,025 / Non-Members \$1,525

All In Bundle: Members \$1,175/ Non-Members \$1,675

2026/2027 Semester Schedule - CAIB Online Discussion Group 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. Running from the final week of September until December.

To accommodate the transition of CAIB New Edition, IBAM is happy to offer our fall Semester classes with the pre-2026 edition of the textbook. This will provide students with a final opportunity for instructor access before the cut off date of the former CAIB edition exam's being offered.

CAIB 1 – Monday Evenings | **CAIB 2** – Thursday Evenings | **CAIB 3** – Wednesday Evenings | **CAIB 4** – Wednesday Evenings

Cost:

Digital Bundle: Members \$650 / Non-Members \$950

Upgrade your self-study: Already registered for Self-Study? You can upgrade to discussion group for the difference in price, simply contact info@ibam.mb.ca for assistance.

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 study material resources to assist in your preparation for the upcoming exam.

Cost:

Digital Bundle: Members \$650 / Non-Members \$1,150

Textbook Only: Members \$750 / Non-Members \$1,250

All In Bundle: Members \$900/ Non-Members \$1,400

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



Customer Service for the Insurance Professional

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 Outline

The Customer Service for the Insurance Professional program is different from other programs in that there are no examinations to write. Working with a mentor of your selection, you will receive a certificate of completion once verification is received from your mentor of each module you succeed in completing.

You will explore the following topics:

Module 1: The Role of the Insurance Broker

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

Module 2: Adding Value to your Brokerage

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

Module 3: Office procedures and brokerage workflows and their impact on:

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

Module 4: The Broker and the Law

- Inadequate Coverage
- Industry Organization
- Career Development

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. Students are asked to have a mentor arranged before registering for the CSIP modules, IBAM is happy to assist those who can not find a mentor in locating a possible candidate to help them through the program.

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)



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 Outline

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.

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.

Start by selecting your elective courses:

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)

Canadian Professional Insurance Broker

Mandatory Course Outline

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

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 & Ethics

Law & 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 & 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 various functional areas of managing a brokerage. Topics include Strategic Leadership, Financial Management, Human Resources, Inside the Brokerage, Sale & Service, Marketing Strategies, Strategic Communication, and Growth, Valuation & Perpetuation.

Cost:

\$530 Members / \$820 Non-Members

Program Format: Self-Study

Exam Dates:

- September 9, 2026
- October 14, 2026
- November 10, 2026
- December 9, 2026
- January 13, 2027
- February 10, 2027
- March 10, 2027
- April 7, 2027
- May 12, 2027
- June 16, 2027
- July 14, 2027
- August 11, 2027

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

