



THE NATIONAL ALLIANCE
for Insurance Education & Research



CISR
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Certified
Insurance
Service
Representative



Front-line training. Bottom-line results.

Continuing education courses for today's busiest insurance professionals...

The Certified Insurance Service Representative (CISR) Program coaches front-line service professionals to understand and analyze risks and exposures. A top-notch faculty and a curriculum that's tailored to specific regions will help everyone in the office stay one step ahead in today's increasingly competitive world.

Who Should Attend

Any employee of an agency, insurance company, or insurance-related business, including customer service representatives, insurance agents, and agency managers, is eligible and welcome to attend CISR courses.

Choose Your Path to Success

The CISR Program consists of nine one-day courses offered in hundreds of locations and online. To earn the CISR designation, choose the five courses that best meet your needs, and take them any way you wish—in the classroom, online, or "mix and match" by combining the face-to-face interaction of a classroom with the convenience of CISR online.

CISR Elite

CISRs can take their education a step further to earn the prestigious new status of **CISR Elite**.

CISR designees who complete the additional four CISR courses and pass the corresponding exams within a three-year time window will be presented with a CISR Elite pin and certificate to symbolize their achievement. By attending annual updates, a current CISR can earn update credit, state CE credit, and credit towards CISR Elite status. For CISRs planning their future career paths, CISR Elite will offer a practical and distinguished choice.



The CISR Courses

Commercial Casualty I

This course strengthens your ability to have productive, assured interactions with customers in the area of commercial casualty exposures and coverages. You will improve your understanding of legal liability and what creates liability exposures. With a central focus on the Commercial General Liability Coverage Form, this course also addresses additional insured exposures and the coverages available to meet these needs.

- Essentials of Legal Liability
- CGL Introduction
- Commercial General Liability Coverage Parts
- CGL—Other Provisions
- Additional Insureds

Commercial Casualty II

This course, like Commercial Casualty I, will strengthen your ability to have productive, assured interactions with customers in the area of commercial casualty exposures and coverages. Improve your understanding in each of these areas:

- Business Auto Exposures and Coverages
- Workers Compensation Policy and Employers Liability Insurance Policies
- Commercial Umbrella and Excess Liability Policies

Insuring Commercial Property

Commercial Property insurance is one of your business customers' greatest concerns. You'll improve your cross-selling abilities with up-to-date knowledge of commercial general property coverage, and reduce E&O exposures. This course gives you the skills to address these issues with greater ease and confidence.

- Fundamentals of Commercial Property Insurance
- Building and Personal Property Coverage Form
- Causes of Loss Forms
- Basics of Time Element Insurance
- Basics of Commercial Inland Marine Insurance

Insuring Personal Auto Exposures

After taking this course, you will be able to assist your clients in identifying their exposures and more effectively advise them throughout the processes of analyzing, obtaining, and modifying their personal automobile policies.

- Introduction to the Personal Auto Policy
- Liability Coverage
- Medical Payments/Personal Injury Protection
- Uninsured/Underinsured Motorists Coverage
- Coverage for Damage to Your Auto
- Coverage for a Rented Vehicle

Insuring Personal Residential Property

This course gives you the expertise you need to guide your customers through the often complex and confusing process of purchasing homeowners insurance—and help them make decisions that insure their most valuable assets.

Its. Classroom, online, or in-house.

- Introduction to the Homeowners Policy
- Homeowners Policy Section I
- Homeowners Policy Section II
- Tenants, Unit-Owners, and the Dwelling Policy

Personal Lines Miscellaneous

This course addresses the exposures created by watercraft, recreational vehicles, and business activities often encountered when working with personal lines clients. Prompting your clients to identify these exposures is crucial, because the ISO Homeowners and ISO Personal Auto Policies provide only very limited coverage. This course will also provide an analysis of the important coverage offered through personal umbrella or excess liability policies.

- Watercraft Exposures and Coverages
- Recreational Vehicles
- Business Activities of Personal Lines Clients
- Personal Umbrella/Excess Liability

It is recommended that students have already taken the CISR Personal Residential Course, or have a working knowledge of the Homeowners Policy Form, prior to attending the CISR Personal Lines Miscellaneous Course.

Agency Operations

This course helps make you an indispensable team player in any insurance agency. As you work with colleagues and customers, you will do so with enhanced self-assurance and a greater understanding of the dynamics within insurance organizations. You'll also gain an understanding of how agencies operate—essential training for both insurance agency and company personnel.

- Legal and Ethical Requirements
- The Insurance Agency
- The Insurance Industry and Marketplace
- Communication
- Agency Workflow
- Account Management
- Errors & Omissions

Life & Health Essentials

This course will help build a better understanding of what your clients need to know about life and health insurance. Your ability to explain to your clients the benefits of having the proper life and health coverage is key to the financial well-being of their families and businesses. Enhance your ability to answer questions and analyze life insurance needs, as well as provide advice about a diverse assortment of

health insurance products—from medical expense coverage to vision care and dental coverage—plus a variety of delivery systems and health plans designed to manage the high cost of care.

- Introduction to Life Insurance
- Term Insurance
- Permanent Life Insurance
- Health Insurance Concepts
- Regulation and Consumer-Driven Plans

Elements of Risk Management

Insurance professionals need training in the risk management process for two reasons. First, insurance is an integral part of your clients' overall risk management program. Second, services provided by carriers, agencies, and brokerages are often significant items in the organization's cost of risk. Take this eight-hour course to learn about each of the five powerful steps in this process, which protect not only the organization's assets, but also its mission and brand.

- The Risk Management Process
- Risk Terms
- Risk Identification
- Risk Analysis
- Risk Control
- Risk Finance
- Risk Administration

Benefits of the CISR Program:

- Practical, up-to-date information to apply immediately.
- Complete knowledge of risks and exposures leads to truly superior insurance service professionals.
- Cross-selling and account-rounding skills.
- CE credit approved in all states, D.C., and Puerto Rico.
- The affordable registration fee includes all the course outlines and policy forms.
- CISR courses will energize, guide, and inspire attendees.

To register or view the CISR course schedule, visit www.TheNationalAlliance.com.



The CISR Designation—a rewarding career challenge

The prestigious CISR designation is recognized nationwide as an important credential—one that benefits individuals, their agencies or companies, and their customers.

By committing to the CISR designation path, participants learn how to manage—and take charge—of their futures and careers. For today's customer service representative, it's an exceptionally rewarding opportunity. The CISR Program is available in three formats:

Classroom. More than 1,300 CISR courses are offered annually nationwide and in Puerto Rico.

CISR Online. A great CISR education is available online. Visit www.TheNationalAlliance.com/online_courses/self_study to learn more about CISR Online.

In-House CISR. Train your entire team and save money by bringing National Alliance programs to your location. For details, go to www.TheNationalAlliance.com/training or call 800-633-2165.

CISR classroom courses conclude with an optional examination. Successful completion of the final exam is required to earn CE credit for CISR Online courses. Complete all five of your chosen CISR courses and pass all five corresponding examinations within three years to earn the CISR designation. To maintain your designation and ensure your continuing career development, fulfill your commitment to update annually by attending courses provided by The National Alliance. Complete the additional four CISR courses and pass the corresponding examinations within an additional three-year time window to earn the distinction of becoming a CISR Elite.

A Proud Tradition

The CISR Program is conducted by The National Alliance for Insurance Education & Research, the nation's premier insurance and risk management education provider since 1969. The National Alliance includes The National Alliance Research Academy, and the following education programs:

- Certified Insurance Counselors (CIC)
- Certified Risk Managers (CRM)
- Certified Personal Risk Managers (CPRM)
- Certified Insurance Service Representatives (CISR)
- Certified School Risk Managers (CSRM)
- Dynamics Series
- The National Alliance School for Producer Development

*The National Alliance for Insurance Education & Research is registered with the National Association of State Boards of Accountancy (NASBA) as a sponsor of continuing professional education on the National Registry of CPE Sponsors. State Boards of accountancy have final authority on the acceptance of individual courses for CPE credit. Complaints regarding registered sponsors may be submitted to the National Registry of CPE Sponsors through its website: www.learningmarket.org.



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