

Tulsa Tech Producer Course Descriptions

2012 Trends in Insurance Legislation

Become more aware of the newly-created Federal Office of Insurance (FIO) and potential legislation which may further affect regulation of the Insurance industry. Recognize trends that might lead to legislation that could affect specific sectors of the Insurance Industry. Gain a better understanding of the provisions and timelines of the new health care reform law (PPACA) and Health Insurance Exchanges and current status of the Oklahoma Health Insurance Exchange (OHX).

Instructor Joe Jordan Approved Legislative Update OID # 1012571 2 hours

Insurance Legislative Update 2011

Inform producers, CSR and adjusters of the new 2011 legislative updates and review the 2010 legislative updates. Raise awareness of the Oklahoma Insurance Department's website as a tool for producers, CSR's and adjusters. Ensure producers, CSR's and adjusters know how to use SBS.

Instructor Joe Jordan Approved Legislative Update OID # 1010617 2 hours

Fiduciary: By Love or By Law

Realize how insurance sale people rank in public opinion. Understand what a "fiduciary" is as we as associated legal responsibilities. Recognize when producers and adjusters are functioning as fiduciaries. Realize that while most duties of producers and adjusters are not legally bound to fiduciary duty, we still owe our clients a fiduciary-like commitment. Have a basic understanding of how to begin should you decide to develop a Personal Code of Ethics.

Instructor Joe Jordan Approved Ethics OID # 1008110 3 hours

Flexing Our Ethical Muscle

Recognize the importance of ethics especially for the insurance industry. Understand the subjective nature of developing and applying ethics. Examine steps for making ethical decisions more objectively and then review and discuss scenarios applying ethical steps and principles.

Instructor Joe Jordan Approved Ethics OID # 1010616 3 hours

E&O A Slippery Slope

Become more sensitive to the increasing risks to which Producers/Adjusters are exposed. Gain an understanding of legal factors underlying potential E&O claims and identify steps that can be made to avoid, or at least minimize the effects of E&O claims. Learn to recognize basic coverage and exclusions in a typical E&O insurance policy.

Instructor Joe Jordan Approved ProGen OID # 1010618 3 hours

Claims Get er Done

Recognize Insurance as an effective method in risk management and why some risks cannot be Insured. Remember Insurance is regulated under the doctrine of "Utmost Good Faith" and violation of that critical doctrine creates serious problems for Insurers. Realize that Insurance fraud is the second most expensive economic crime in America. View examples of actual Insurance claims and have an opportunity to exercise critical thinking skills.

Instructor Joe Jordan Approved ProGen OID # 1011390 4 hours

So You Think You Know P/C Insurance

Have a better understanding of coverages and exclusions in the following lines of insurance: Homeowners, Commercial Property, Business Auto, Personal Auto, Workers Compensation/Employers Liability, and Miscellaneous Insurance policies including Crime and Inland Marine. Understand some of the more important Oklahoma insurance laws and regulations regarding: The Office of Insurance Commissioner, Rate and Policy Filings, Insurance Binders, and Producer Licensing. And have a better grasp of Insurance policy contract language, Insurance Co. Dept. functions, Insurance Industry professional designations and miscellaneous insurance terminology.

Instructor Kevin Allen Approved ProGen OID # 1011418 4 hours

Xactimate® 27 - Computer Based Property Estimating Using Xactimate 3 days

Please bring your own computer/laptop with Xactimate 27 Installed PRIOR TO class. A free 30 day demo is available from Xactware. External Mouse is recommended. Insurance card or IICRC ID card required for credit.

Designed for new to intermediate Xactimate® users or users who need to update on the latest version, Xactimate® 27.

Instructor Sean Burgess Approved ProGen Watermark OID # 106753 22 hours or .5 IICRC credit event 2279

Xactimate 27 Interior Sketch Diagramming

Please bring your own computer/laptop with Xactimate 27 Installed PRIOR TO class. A free 30 day demo is available from Xactware.

External Mouse is recommended. Insurance card or IICRC ID card required for credit.

Ge up to speed on Xactimate® 27 Interior Sketch! Focus your learning in this 4 hour course. We'll cover creating floor plans, room templates, rooms on multiple levels, flooring tools, and more! No prior knowledge of Xactimate® Sketch is required.

Instructor Sean Burgess Approved ProGen Watermark OID # 1009959 4 hours or .5 IICRC credit event 2280

Xactimate 27 Roof Sketch Diagramming




Please bring your own computer/laptop with Xactimate 27 Installed PRIOR TO class. A free 30 day demo is available from Xactware.

External Mouse is recommended. Insurance card or IICRC ID card required for credit.

It's time to sketch roofs using Xactimate® 27! We'll cover creating roofs, tie-ins, roof templates, roof macros, using graphical estimation, and more! We'll also cover FAQ's such as: What measurements do I need? How/Why to lock in measurements? No Prior knowledge of Xactimate® Sketch is required.

Instructor Sean Burgess Approved ProGen Watermark OID # 1009960 4 hours

Tulsa Tech Insurance Producer CE Instructors

<p style="text-align: center;">JOE JORDAN</p> 	<p>Joe Jordan has 30 years of insurance sales and sales management experience.</p> <ul style="list-style-type: none">• Managing Member of Integrity Group L.L. C., and independent agency• Masters degree in Education <p>Joe's teaches insurance continuing education as well as provisional 8 hour and life/accident & health licensing. His goal is to make class enjoyable yet informative by integrating relevant topics with real world applications.</p>
<p style="text-align: center;">KEVIN ALLEN</p> 	<p>Kevin Allen brings over 32 years of insurance experience into the classroom. He has been an adjuster, underwriter and agent for several companies.</p> <ul style="list-style-type: none">• Instructor for various insurance courses since 1988• Former owner of independent insurance agency• Past President of Professional Insurance Agents of Oklahoma• Earned CPCU, ARM and LUTCF designations <p>Kevin teaches insurance continuing education as well as licensing. He draws from his experience to make classes informative, interesting, and interactive.</p>
<p style="text-align: center;">SEAN BURGESS</p> 	<p>Sean Burgess brings over 10 years experience into the classroom. He is a Xactimate Certified Trainer and an experienced field adjuster.</p> <ul style="list-style-type: none">• Corporate Xactimate Trainer for a national independent adjusting firm• Developed Xactimate curriculum• Taught Xactanalysis File Reviewer• 2007 started Watermark, a Xactimate training company <p>Sean draws from his experience to provide valuable, industry relevant hands-on training in a patient learning environment.</p>