

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

Insurance Economics: Made Almost Interesting

Recognize the prominence of insurance industry has in our national and state economics and some of the impacts the Financial Crisis has had on our industry. Examine the threat that catastrophes represent to our economy and the continuing pressure they place on our industry. Understand how insurance companies make money and recent production trends.

Instructor Joe Jordan Approved ProGen OID # 1008111 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 # 1010620 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 # 1011391 4 hours

Potpourri a Smorgasbord

Become aware of a significant investigation of Life Insurers' questionable activities. Become more familiar with two little-known veteran benefits. Recognize Medical Tourism as an increasingly popular healthcare option. Realize climate change is a threat to the Insurance industry. Recognize the distribution channels in the Insurance industry and speculate on the future.

Instructor Joe Jordan Approved ProGen OID # 1011392 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 # 1011419 4 hours

Long Term Care Part 1 and 2

Understand the need for Long Term Care including the cost. Explore options for financing LTC. Examine Medicaid and Medicare and how they interface with LTC Insurance. Examine the Oklahoma Long Term Care Partnership program. Review the levels of Long Term Care, LTC policy features, exclusions, and riders.



Instructor Joe Jordan Approved LTC Partnership OID # 1009067 8 hours LTC can be used for ProGen CE

Long Term Care Part 2 Follow up

Understand the evolution of Long Term Care Insurance. Examine the Oklahoma long term care partnership program and Qualified LTC Partnership policies. Review Medicaid benefits for LTC. Look at other LTC Financing Options. Review ethical considerations in the sale of LTCI. Update on recent changes for LTCI.

Instructor Joe Jordan Approved LTC Partnership OID # 1009066 4 hours LTC can be used for ProGen CE

Tulsa Tech Insurance Producer CE Instructors

<p>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>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>