

# Wisconsin Continuing Education Registration

## Thursday April 15, 2010

Knights of Columbus  
3200 S. 103rd Street  
Milwaukee

First: \_\_\_\_\_ Last: \_\_\_\_\_ Initial: \_\_\_\_\_

Insurance Agency / Company Name: \_\_\_\_\_

Address: \_\_\_\_\_  
(use address as it appears on your license)

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Business Phone: \_\_\_\_\_ Business Fax: \_\_\_\_\_

Date of Birth: \_\_\_\_\_ Wisconsin Insurance License Number: \_\_\_\_\_

Business Email: \_\_\_\_\_

- Morning Session: 8:00AM - 12:00PM** (This course is new for 2010 and a number has not yet been assigned)  
**4 Regular CE Credits | \$8.00**

### Personal Lines : Meet The Jurgensons

This class will take a unique and in depth look at a typical Personal Lines client in 2010, by introducing the class participants to the Jurgenson family. Attendees will be "meet" Sven, Helga and their children and will be asked to provide a detailed analysis using checklists, surveys, waivers, and company specific forms of all exposures to potential losses this busy family may incur. The class format will look into specific coverage's necessary and those often overlooked, forgotten, or misunderstood and will explore the agency's professional and ethical duties in providing insurance products and services. Using a Risk Management approach of identification, analysis, risk-transfer, and risk review, this 4-hour class is designed in a fast-paced, discussion format that will provide real-life, practical, insight into many of the challenges agents face today when properly insuring more complex personal lines accounts.

**Instructor – Todd Davis**

- Afternoon Session: 12:45PM - 4:45PM** (This course is new for 2010 and a number has not yet been assigned)  
**4 Regular CE Credits | \$8.00**

### Commercial Lines : Walk-About

This new class for 2010 will present a unique twist on the methods used by agents to explore the insurance needs of a small commercial lines account by "walking through" a sample client. Participants will be presented information about a family-owned business and will be guided through the 4-step Risk Management process including the interview process, using checklists, coverage waivers, analyzing current insurance, and recommending applicable coverage. The class will touch on Errors and Omissions Loss prevention techniques and how through proper exposure analysis, agencies can write more business in a difficult insurance climate. The class format will look into specific coverage's necessary and those often overlooked and will explore the agency's professional and ethical duties in providing insurance products and services to business insurance clients. This 4-hour class is designed in a fast-paced, hands-on, discussion format that will provide real-life, practical, insight into many of the challenges agents face today when properly insuring commercial clients.

**Instructor – Todd Davis**

Everyone is welcome to stay for lunch immediately following the morning session. Please check one:

- Yes, I will stay for lunch**       **No, I can not stay for lunch**

NOTE: If you sign up for lunch and are unable to attend at the last minute, please call to let us know so we contact the caterer.

**Registration and payment must be received by Friday, April 9th. Classes fill fast & in the order received. The COST is \$8.00 per seminar session. Make all checks payable to: Klein-Dickert Auto Class. Write 'CE Processing Fee' on your check.**

### Mail your payment with registration to:

**Klein-Dickert Auto Glass**  
13170 W. Capitol Drive  
Brookfield, WI 53005

*An email confirmation will be sent when your payment has been processed.*

### Contact and CE Sponsorship:



**Klein-Dickert Auto Glass**  
Andy Wolf / Eric Bitar  
262-781-2565



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262-549-4300



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