

E&O HAPPENS



AGENCY E&O EXPOSURES AND DEFENSES

2024 Dates & Locations

Members-only events

Oct. 8 — Hybrid

Jefferson City

MAIA Headquarters,
3315 Emerald Ln., 573-893-4301

Online

GoToWebinar

Webinar instructions will be sent via email a few days before the event.

Oct. 15 — Springfield

Oasis Hotel and Convention Center
2546 N. Glenstone Ave.
417-866-5253

Oct. 16 — St. Louis

Route 66 Holiday Inn
10709 Watson Road
314-620-2148

Class Schedule

8 - 8:30 am	Registration
8:30 - 11:30 am	E&O Class
11:30 am - 1 pm	Agency Compliance Luncheon

E&O Seminar approved for 3 ethics CE credits in Mo. & Kan., Agency Compliance pending approval for 1 ethics CE credit in Mo. & Kan.

What you will learn

“Agency E&O Exposures and Defenses” is an interactive seminar that looks at the risks of error & omission claims for an independent insurance agency. This course will serve as an update and reminder for insurance professionals about the risks of E&O claims and allegations and also the rewards an agency could earn for strong internal practices and good customer service. It is important to raise awareness of where E&O vulnerabilities exist and take the time to develop strong habits among agency personnel. This seminar will utilize claim statistics, case studies, storytelling, risk assessments and questionnaires to provide an engaging environment for participants to learn in.

In order to meet the 3-hour requirement, the following individual modules are included in this course:

1. Introduction to and understanding negligence and standard of care
2. Agency defenses
3. Common claims against agents
4. E&O considerations of agency operations



Instructor
Beth Smoller

Beth is a native Kansan who grew up near Holton, Kansas.

After graduating from Kansas State University, she then attended and graduated from the University of Kansas School of Law. After briefly engaging in the private practice of law, she joined an independent insurance agency in Manhattan where she spent several years as a commercial account manager and later served as the director of operations, compiling nearly 13 years with the agency.

Beth joined the Kansas Association of Insurance Agents (KAIA) in 2018 as the vice president of agency services. She was elevated to the role of chief operating officer and general counsel in 2021.

She serves on the executive board for the Greater Manhattan Community Foundation and was previously on its board of trustees. She also serves as a board member for Girls on the Run – Flint Hills. She is a member of the Leadership Kansas Class of 2023.

She and her husband, Brian, have two children and live outside of Manhattan. Beth is an avid runner and enjoys cooking and eating (hence, being an avid runner).

Agency Compliance Luncheon

Get the answers to your most frequently asked questions from MAIA's CEO Matt Barton. He will cover new laws, regulations, and other industry developments — information you really need to know.

We have again included the annual Agency Compliance Luncheon with our E&O Seminars, so you can get all of the information in just one day, plus lunch! You can register for both or only the Agency Compliance Luncheon if you choose.

The Agency Compliance Luncheons are:




- ✓ Exclusively for MAIA members
- ✓ Beneficial for all agency staff

Topics to be discussed include:

- ✓ Statute of limitations
- ✓ Third-party litigation funding
- ✓ Motor vehicle financial responsibility
- ✓ Joint and several liability
- ✓ DOL overtime rule
- ✓ FTC noncompete rule
- ✓ Cannabis in the workplace
- ✓ Healthcare sharing ministries
- ✓ Collateral source rule

SEMINAR QUALIFIES FOR SWISS RE (ADMITTED PRODUCT), ALLIANZ AND UTICA'S RISK MANAGEMENT CREDIT UNDER THE FOLLOWING CONDITIONS:




SWISS RE AND ALLIANZ:

 Agency Staff Size	 Required # Attendees	 Position in Agency
1-4	1	Active agency principal*
5-11	3	At least 1 active agency principal*
12+	25% of staff with a max of 15 attendees	At least 1 active agency principal*

*"Active agency principal" includes: owners, partners and officers. Each part-time employee counts as one.

Swiss Re policyholders can earn an additional 5% credit by sending at least 50% of their staff. Round up for part-time employees.

UTICA:

 Agency Staff Size	 Required # Attendees	 Position in Agency
1-3	1	Principal/office manager or CSR.
4-10	2	Principal/office manager and 1 CSR.
11-20	3	Principal/office manager and 2 CSRs.
21+	-	20% of staff.

**WHEN DO I NEED TO RENEW?
Every two years**

2024 E&O Seminar and/or Agency Compliance Luncheon Enrollment Form

Select date and location:

Oct. 8, Jefferson City Oct. 8, Online Oct. 15, Springfield Oct. 16, St. Louis

Name _____ Nat'l Producer # _____ Date of Birth _____

Which best describes your role? Owner/Principal Agency Mgr. Producer Account Mgr. Customer Service Co. Rep.

Organization _____ E-mail _____

Address _____ City/State/Zip _____

Phone _____ Title _____

Emergency Contact _____ Emergency Contact Phone _____

Take advantage of our convenient online registration at www.moagent.org/roadshows.

REGISTRATION - CHOOSE ONLY ONE <i>Available to MAIA members only.</i>	BOTH E&O Seminar and Agency Compliance Luncheon (included)	ONLY Agency Compliance Luncheon	Amount Enclosed
Early-Bird Registration (2 weeks prior to class date)	\$110	\$50	\$
Regular Registration	\$130	\$60	

OR

METHOD OF PAYMENT: Check enclosed or MasterCard Visa American Express Discover

Card No: _____ Exp. Date: _____ Cardholder Signature: _____

Card Verification Code: _____ Billing Zip Code: _____

Please make checks payable to: Missouri Association of Insurance Agents, 3315 Emerald Lane, Jefferson City, Mo. 65109.

CANCELLATION POLICY:

You will not receive a refund or transfer credit if you do not notify MAIA before the start of the event. All cancels and transfers must be received in writing. Refunds: A 90% refund applies if cancelling more than two weeks prior to start of event; 75% refund if cancelling fewer than two weeks before the event. A \$15 transfer fee will be assessed on any one-day seminar transfer made within 2 weeks of the program. Transfers may only be made to another MAIA course. Student must indicate a transfer course within two weeks of cancellation or appropriate percentage of tuition will be refunded.

ACCOMMODATIONS:

We work hard to make our programs accessible to all. If you need special accommodations, simply call MAIA at 573-893-4301 or email maia@moagent.org. Please notify us if you have any special dietary requirements.