

Face-to-Face Training 2011

2011 Training directory



Discover the
advantage for
your business

■ Exam revision ■ Foundation ■ International ■ Aviation ■ Marine
■ Energy ■ Reinsurance ■ Liability ■ Motor ■ Risk Management
■ Underwriting ■ Property ■ London market
■ Compliance ■ Regulatory ■ Executive development



CII

tel: +44 (0)20 8989 8464 ■ www.cii.co.uk



No one has a deeper knowledge or wider experience of the insurance and financial services industry than the CII. We set the standards for learning and professional behaviour the world over.

Building careers, boosting professionalism

As the CII, our purpose is to promote and support ever-higher standards of technical knowledge, business skills and professional conduct throughout the industry. We achieve this aim by providing the industry with a unique framework of learning and development solutions.

Our portfolio of products and services is constantly evolving to reflect the dynamics of the industry and our clients' changing needs. We have moved far beyond being simply a qualifications provider.

This directory outlines the variety of the CII's face-to-face training capability. It provides insight into the ways in which staff development can be accelerated and enhanced through CII training.

The industry's training provider

Whether you are interested in developing your own career and professional standing, or have responsibility for the training needs of others, you'll find in the introduction a wealth of information to guide you on how to get the most out of the CII's face-to-face training programme.

Our training courses help insurance and financial services professionals of every kind to develop their careers.

Face-to-face training offers a number of key advantages:

- harnesses the experience and expertise of leading industry practitioners with first-hand knowledge of the issues
- places delegates in a stimulating, challenging and ultimately rewarding group environment
- facilitates networking with colleagues and with others from across the industry
- offers a range of learning opportunities to suit different needs and preferences including long and short courses, full- and part-time attendance.

As you would expect, to reflect current pressures on individual and corporate budgets, we work to make the cost of our training as competitive as possible.

In pursuit of professionalism

This directory details courses which support the technical knowledge, business skills and personal development that are a requirement of any career professional.

Take the time to explore the variety of courses available. You'll be surprised by the range on offer, and remember, the portfolio is expanding all the time.

If you are an employer searching for courses for your staff, our flexible delivery options can ensure that our training solutions match your precise requirements.

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The Chartered Insurance Institute (CII) Professionalism in practice

As the premier professional body for the financial services profession, the CII promotes higher standards of integrity, technical competence and business capability.

With over 95,000 members in more than 150 countries, the CII is the world's largest professional body dedicated to this sector.

Success in CII qualifications is universally recognised as evidence of knowledge and capability. Membership of the CII signals a desire to develop broad professional capability and subscribe to the standards associated with professional status.

The CII works with businesses to develop bespoke, company-wide solutions that ensure competitive advantage by enhancing employees' technical and professional competence.

Individually, CII's members are able to drive their personal development and maintain their professional standing through an unrivalled range of learning services and by adhering to the CII's Code of Ethics.

www.cii.co.uk



**INVESTORS
IN PEOPLE**

Contacting the CII

If you have any queries regarding this brochure please contact Customer Service.

The CII is committed to delivering a first-class service and, to this end, we welcome feedback on any aspect of your relationship with our organisation.

Please forward any views you may have on the service you receive, whether they are positive or otherwise.

We take all such comments seriously, answer them individually, and use them to help ensure that we continually improve the service we provide.

Customer Service

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email: face-to-facetraining@cii.co.uk

website: www.cii.co.uk/f2f

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Supporting individual learning

The CII offers training for all abilities, from foundation to advanced levels and for many sectors and disciplines. We cater for individuals looking to develop their career and professional standing, and for organisations looking for solutions to their staff training and development needs.

The range and depth of our programme enables you to find courses that can help you get started, expand your learning in a specialised field, support you in obtaining essential qualifications or simply consolidate your knowledge and maintain your competitive edge.

Introduction and induction

If you are new to the industry, or changing roles within it, the CII's introductory-level training courses are an essential first step. These courses provide a platform for further learning and development.

Foundation learning

Your introduction to the business should begin with a basic grounding in core concepts. You can find foundation courses in all the main areas of insurance as well as the London market and financial services.

Technical training

As the industry-leading professional body, the CII has an unrivalled track record in technical training. The current programme comprises subjects much in demand among practitioners in specific industry disciplines including:

- Liability
- Risk management
- Property
- Reinsurance
- Regulation
- Life assurance
- Pensions
- Compliance

Exam success

Most CII qualifications and examinations candidates choose to study on a distance learning basis. However, many find huge benefit from attending courses where expert tutors share their in-depth knowledge of the subject matter and provide invaluable insights into the exam process and what the examiners require.

In 2010, people attending CII revision courses improved their chance of passing exams by as much as 50%, which explains why these courses are consistently popular with candidates for all our exams.

Keeping your knowledge up-to-date

Professional development and learning activity are a central and ongoing part of any successful career.

Keeping abreast of technical and market developments helps you perform effectively. It also satisfies regulatory obligations and the requirement for qualified CII members to keep their knowledge up-to-date.

All CII training material is delivered to CII Continuing Professional Development (CPD) accreditation standards and can, therefore, count towards the CII's CPD requirements for qualified members.

Executive development

The higher you move up the career ladder, the greater the responsibility you carry to broaden your skills, often into areas not covered by exam syllabuses or in-house training programmes.

CII management courses are an excellent way to expand your learning, broaden your skill-set and improve your career prospects. They cover the application of general business skills and demonstrate their relevance and value within the insurance and financial services context.

Reacting to market change

You need to be fully up-to-speed with market practice and aware of emerging trends and developments. We constantly review, enhance and expand our training course programme to ensure it matches the needs of the industry and all those who work in it.

As new courses are developed these are added to the online course programme.

- www.cii.co.uk/f2f

CII Face-to-Face Training addresses your changing needs as you progress in your career

We recognise no two careers are the same. People progress at different speeds and in different directions. The CII offers a wide range of courses to suit all needs, so that, whoever you are and wherever you want your career to go, the CII can help you get there.

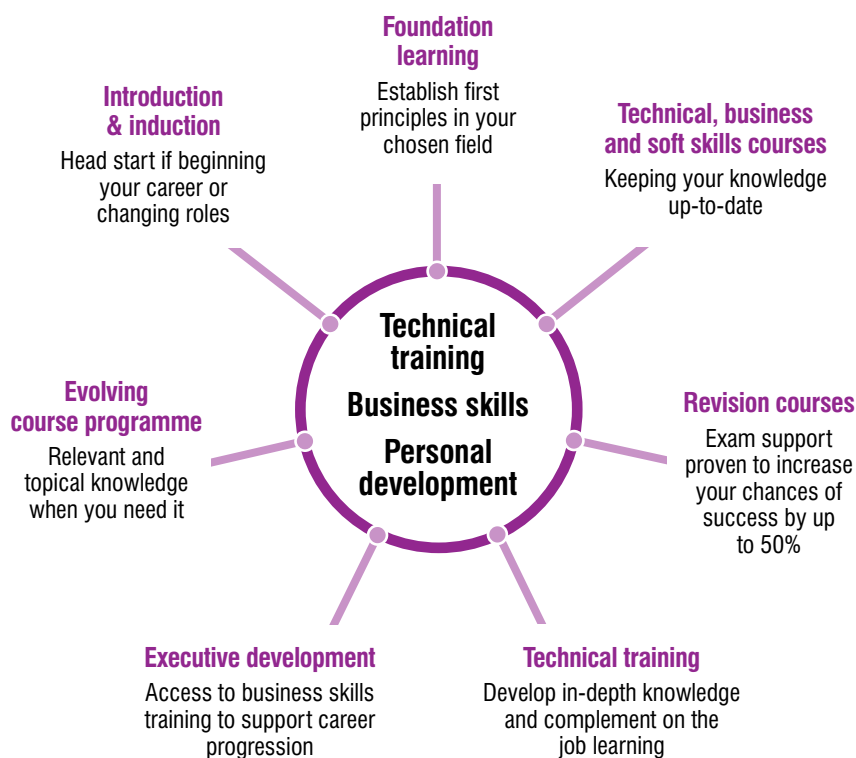
A spectrum of opportunity

The CII family caters for the insurance and financial services community in all its complexity and variety. Via a range of faculties (covering broking, underwriting, claims, the London market and life and pensions), and through the Personal Finance Society (PFS) and the Society of Mortgage Professionals (SMP), the CII provides a range of additional events developed for specific market sectors.

In addition to formal events, these organisations provide opportunities to attend presentations and seminars and to mix with peers to discuss the issues of the day.

Further details on the events available from each can be found at:

- Chartered Insurance Institute – www.cii.co.uk
- Personal Finance Society – www.thepfs.org
- Society of Mortgage Professionals – www.cii.co.uk/mortgageprofessionals
- Faculties – www.cii.co.uk/faculties



Continuing Professional Development (CPD) – All the training courses in this directory can count towards the CII/PFS CPD requirements for qualified members. For full details on the CII CPD scheme visit: www.cpd.cii.co.uk

Supporting corporate training activity

The CII has developed a portfolio of products and services to help companies provide their staff with the right training and development support. Our courses are suitable for individuals at all stages of their career and across all market sectors. We help employees, and their employers, to achieve levels of competence and capability necessary for professional and commercial success.

We strive to be as flexible as possible in the way we deliver our services. We run scheduled courses at our premises in London and will happily work with corporate clients to deliver courses at their offices or other locations. We can tailor our courses to suit particular needs and develop new ones as required.

Regulatory compliance

Statutory regulation affects the entire UK insurance and financial services industry, but compliance is not an end in itself. Importantly, it also develops the disciplines and awareness that create efficient, successful businesses.

CII courses cover topical regulatory issues and respond to new areas of concern as and when they arise. The courses are practical, current and delivered by experts and benefit hugely from the live teaching environment, which stimulates active interpretation and understanding of how principles are applied.

Cost-effective means of improving training activity

While in-house training provision will always be important, many organisations find they benefit from combining this with CII training courses. The CII's tried and tested programme can complement existing in-house provision to deliver results in a cost-effective manner saving on travel expenses and reducing the time away from the office.

Training that matches your business needs

CII expertise can be accessed via face-to-face courses in several ways. You can select from our portfolio of existing courses; you can adapt an existing course so that it aligns with your expectations and requirements; and you can commission a completely new course to address a particular need.

This choice allows you to shape your training and development activity according to your needs and budget.

Utilising your in-house capabilities and resources

CII courses can be licensed for use within your own premises, with delivery by your own staff. Where required, we can also provide 'train the trainer' services and lend whatever support is necessary to ensure effective delivery. Our aim is to fit in with whatever approach you choose to adopt.

Improve exam pass rates

Statistics demonstrate that those who attend CII revision courses have a better prospect of passing their exam – by as much as 50%. In addition to cost savings on resits, this brings substantial benefits through staff achieving operational effectiveness much more quickly.

Develop a holistic training solution

All organisations have a range of training needs, from technical skills in one or more classes of business to general business and communications skills. The range of CII courses means companies now have access to a one-stop-shop training solution provider, who can not only cater for every training need, with new courses created where required, but can also offer an unrivalled choice of delivery options.

We provide training that supports your business and develops your people

Every organisation has its own requirements, and these will change over the course of time. The CII has developed a broad range of services to cater for each company's specific needs, ensuring that they respond to changing circumstances and consistently provide value for money.

Develop tomorrow's leaders today

Modern organisations are concerned with nurturing and retaining talent – and talent is drawn to places where it is respected and encouraged to develop further.

CII courses are tangible means whereby companies can demonstrate their commitment to the professional development of their staff, both as industry practitioners and, where appropriate, industry leaders. A range of sector-specific and general courses are available.

Focus on new issues

On occasion, companies need to bring all staff up to speed with a particular new or developing issue – recent examples might be Treating Customers Fairly (TCF) or Contract Certainty.

Face-to-Face training can be used as a flexible business tool to facilitate this sort of organisation-wide communication exercise, with managed delivery and quantifiable impacts.

Accreditation

CII accreditation, through Accreditation Services, benchmarks an organisation's in-house training provision against objective standards, including those of the FSA and/or the CII's own CPD or qualification standards. This means that companies can validate their own activity to the same level as 'bought-in' CII services. See www.cii.co.uk/accreditation for details.



your training partner

Your corporate training partner

Make the CII your corporate training partner

In-house training

Our scheduled programme is comprehensive and accessible. But we realise that demand exists for in-house provision, whether this be existing CII courses, where necessary adapted to your particular specifications, or the creation of new courses.

By working with the CII at your premises (or other chosen location) you can add training and development capacity to match your needs. Courses can be delivered at any location throughout the world.

In all instances we work alongside your training department, matching your routines and practices to ensure the most effective provision. In-house training is also a very cost effective way to train groups of staff compared to sending individuals on the courses at different times and locations.

Additional course options

In addition to the courses listed in this directory the CII offers a portfolio of other existing courses that can be delivered in-house, including but not limited to: project management, sales and marketing, personal impact and communication. Contact Face-to-Face Training to find out more.

Bespoke course development

If you choose bespoke course development, our training advisers will provide you with all the support you require to help develop a solution tailored to your business needs.

Our systematic approach covers needs analysis, planning, course design, delivery and evaluation.

If training is required on a particular subject that does not currently appear in this directory, please contact us as we have unrivalled experience in course creation.

Worldwide delivery and licensing

A training course complete, off the shelf!

A majority of our course materials and content is available under licence for delivery by your team.

We can also provide 'train the trainer' support. Such courses might include 'refresher' sessions, exam updates and insight on what examiners are looking for, all of which will benefit your training team.



CII qualifications and expert training are an important part of the Towergate Business School curriculum. We need a broad skill set to keep us competitive, especially in today's market.

All insurance roles at Towergate require an appropriate CII qualification and they are an integral part of our recruitment and retention policy.

In-house training with the CII combines quality with flexibility to deliver a business service aligned to your needs.



As a CII Partner in Professionalism we ensure that our people have access to the very best training, not only in support of their professional studies but also to develop their wider knowledge and skill. We work with the CII's Face-to-Face Training team to bring expert tuition in-house to people at all levels. ””

Fiona Andrews

Group Head of People Development & Reward
Towergate Insurance



Regional broker training

Regional broker face-to-face training

In addition to the core London based face-to-face training programme detailed in this directory, the CII also offers a dedicated broker regional training programme.

Delivered through the CII Broker Academy, this offers a training programme delivering a mix of key technical, business, management and sales courses at 12 locations across the UK, as shown opposite. Further centres are to be added in line with demand.

Conceived and developed following regional consultation with brokers, the programmes deliver a stimulating and rewarding learning environment designed to sharpen broking skills and enhance career potential.

The regional programme, delivered by Searchlight Insurance Training, offers high-quality training at affordable prices, with courses typically starting from only £120.

Courses are delivered by leading market practitioners who share first-hand experience of the key issues facing today's brokers.

Funded broker management development programme

This is a 5 day management development programme for owners, directors and senior managers of broking firms.

Delivered one day a month, the programme covers the core competencies needed by senior broking staff to succeed in today's competitive environment:

- Strategy and business planning
- Leadership
- Financial accounting
- Succession planning and interview skills
- Sales and relationship management.

Utilising government funding through the 'Train to Gain' initiative, brokers are able to attend the entire programme for as little as £500.

See page 120 for full details.

New for 2011

In consultation with brokers around the country we are pleased to introduce exciting new courses in 2011. These include:

- Social media marketing
- Measuring the effectiveness of your training (ROI)
- How to secure more business from your clients

For further information on regional training and the funded management development programme visit www.cii.co.uk/brokeracademy and plug into an unrivalled range of broker-specific training solutions.

“ even after my years in the industry I still found it very useful ”
Liverpool delegate

“ great trainer and interesting content ”
Birmingham delegate

“ very productive and informative ”
Glasgow delegate

“ the feedback from my team has been excellent ”
UK national broker

Note: The Broker Academy was developed by the CII's Faculty of Broking in partnership with AXA and BIBA. The Broker Academy provides access to the CII's unrivalled range of broker-specific training solutions.



1	Birmingham	7	Newcastle
2	Bristol	8	Norwich
3	Leeds	9	Redhill
4	Leicester	10	Edinburgh
5	London	11	Glasgow
6	Manchester	12	Belfast



what's new/bestsellers

Quality, flexibility and competitiveness Bestseller courses

Quality, flexibility and competitiveness

No one has a deeper knowledge or wider experience of the insurance and financial services industry than the CII. Our training courses help insurance and financial services professionals of every kind to develop their careers.

In addition to our reputation for delivering industry leading training, we pride ourselves on the service we deliver and the experience of our customers. Coupled with our commitment to affordable training and maximising your training budgets, the CII offers the ultimate training package. Read on for further details of our service quality...

Industry expert trainers

Each and every trainer we use has been carefully chosen for their specialist knowledge and wealth of experience as well as their flair for delivering impactful and inspiring training to meet your training objectives. Our trainers are committed to delivering training of the highest quality and ensuring delegates leave the course with knowledge and ideas to apply in the workplace.

Discounts for members and for block bookings

Stretch your training budget by taking advantage of our exclusive member discounts, on average our members can typically save 13% on the cost of training (see page 15). Corporate customers can make considerable savings when making block bookings. Contact us to discover how much you could save.

Training courses

 Bestseller courses

We're often asked which of our courses are most popular, so for quick reference we've introduced the bestseller icon which you'll notice within the course listings.

See opposite for a summary of our bestsellers – if you're interested in one of these courses you'll need to move fast as they're always quick to sell-out!

Flexibility

We offer an extensive programme of scheduled training courses across numerous disciplines. We appreciate that training needs evolve and that finding the time to attend can be difficult. That's why we offer a bespoke service so that you can tailor courses to specific company needs and we can run these in-house. We also add courses to the standard programme throughout the year to cater for increased demand.

Customer satisfaction

We pride ourselves on delivering high quality training and great service and this is reflected by our extensive client list and consistent levels of excellent customer feedback. In the unlikely event you are unhappy with a course we'll refund your course fee or organise a replacement course for you.

Minimising the effects of staff turnover

We understand that when employees leave this can cause headaches for your training budget. So, if a staff member leaves within 6 months of attending a CII training course we'll be happy to welcome their replacement to attend the same course **free of charge** – making your budget work harder for you.

Insurance exam revision

- P05 Evening class – page 24

Financial exam revision

- CF5 Intensive – page 34
- R01 Revision day – page 40

Foundation courses

- Introduction to the London market – page 50
- A brief introduction to insurance – page 50

Marine

- Marine insurance (introductory) – page 68
- Marine cargo (intermediate) – page 76
- Marine hull (intermediate) – page 76

Reinsurance

- Non-marine reinsurance (intermediate) – page 80

Liability

- Liability insurance (introductory) – page 84

Risk management

- Risk management (introductory) – page 92

London market

- Commercial insurance contract wording – page 100

Compliance

- Being a compliance officer – page 108
- Treating customers fairly – page 112

Executive development

- One day MBA – page 118

Training venues and corporate venue hire Get the most from the CII

Course venues

Full programme



London

Fountain House, 130 Fenchurch Street, London EC2M 5DJ

Fountain House is home to the CII training venue situated in the financial and insurance district of the City of London. Just minutes from Fenchurch Street, Liverpool Street, Canon Street and Bank rail stations.

Revision programme

The following venues offer scheduled exam revision courses and can also run any of the other courses in this directory subject to demand.



Birmingham

The Beeches Management Centre, Selly Oaks Road, Bournville, Birmingham B30 1LS

The Beeches is situated in Bournville just 15 minutes from the centre of Birmingham.



Bristol

The Beeches Hotel & Conference Centre, Broomhill Road, Brislington, Bristol BS4 5RG

Easily accessible by road with ample parking facilities.



Glasgow

The Mitchell Library, North Street, Glasgow G3 7DN

Located in central Glasgow in close proximity to Charing Cross Station and numerous transport links.



Leeds

Eagle House, Torre Road, Leeds LS9 7QL

Just outside the city centre, Eagle House is conveniently located next to the A64 York Road.



Manchester

The Freemasons' Hall, 36 Bridge Street, Manchester M3 3BT

The Freemasons' Hall is located at the heart of the city in the Deansgate area, easily accessible by road or rail.

Get the most from the CII

The CII gives you access to an ever expanding range of learning and competence tools, and to the industry's biggest network of professionals. This range of services is constantly refined and kept up-to-date to reflect the demands of today's competitive environment and to take account of regulatory and legislative requirements and changes in market practice.

Membership

The best way to enjoy all that the CII has to offer is by joining.

Members enjoy access to an unrivalled range of services. The benefits are clear:

- Develop market, technical and business skills
- Access exclusive member rates on training courses, qualification learning materials and exam entry
- Receive practical tools and guidance to improve knowledge and understanding.

Corporate venue hire

Need an affordable venue in the heart of the city? Then consider the CII Face-to-Face Training suite.

Location

Situated in the heart of London, 130 Fenchurch Street is highly accessible, located just a few minutes walk from Fenchurch Street and Liverpool Street stations.

Venue and facilities

With 4 spacious fully air-conditioned suites, equipped with interactive equipment we can accommodate:

- Business meetings
- Corporate seminars
- Early morning and evening events
- Training events and assessment centres
- Conferences for up to 50 delegates

Full refreshment facilities are available as well as public access computers and access to office facilities (copy/print/stationery).

Viewings and bookings

Why not take a closer look?

To arrange a viewing of the facilities and discuss your requirements please call +44 (0)20 7283 3117 or email face-to-facetraining@cii.co.uk



Member discounts on paid-for services

Discounts of 13% or more are typically available for members on the courses throughout this brochure. For example, you can save £135 on our 2 day 'Oil Workshop (advanced)' intensive revision course by becoming a member. With a year's CII membership starting from as little as £70 it makes sense to join!

To find out more about the membership benefits on offer visit www.cii.co.uk/membership and join online.

For those working within the financial planning or mortgage industries, the option exists to join either the:

- Personal Finance Society – www.thepfs.org
- Society of Mortgage Professionals – www.cii.co.uk/mortgageprofessionals

A world of learning at your doorstep

The CII is rightly recognised for its market-leading framework of qualifications. As the industry's premier professional organisation, it also provides a comprehensive portfolio of products, services and support facilities for companies and for individuals at all stages of their career.

These include online learning and assessment tools, CPD support, professional standards and sector specific information through its family of faculties and societies.

To find out more about the full range of services on offer from the CII visit www.cii.co.uk or call Customer Service today on +44 (0)20 8989 8464.

Booking training Contacting us

How to book a course

1. Select your course

2. Four ways to book



Online: Bookings can be made through the CII's website at www.cii.co.uk/f2f



Phone: Customer Service on +44 (0)20 8989 8464.



Fax: Customer Service on +44 (0)20 8530 3052.



Post: Customer Service, CII, 42–48 High Road, South Woodford, London E18 2JP.

Please complete the booking form in BLOCK CAPITALS and post or fax to Customer Service. A separate form is required for each delegate, please photocopy or download from www.cii.co.uk/f2f for additional bookings.

3. Three ways to pay



Credit/debit card: If booking online or by phone or fax, payment must be by credit/debit card.



Cheque: Your cheque, made payable to 'The Chartered Insurance Institute', should be sent together with your booking form.



Company invoice: For information on company invoicing arrangements please contact Customer Service.

Existing corporate accounts can submit their bookings via email to application@cii.co.uk giving their account details. For non-account holders, if you wish to be invoiced please submit your booking on headed company paper.

Note: Payment in full is required to secure a course place and must be received before the course commences.

4. Acknowledgement of booking

An acknowledgement will be posted within 7 working days of the receipt of your application. If course places are not available as requested, or we need to clarify any of the information on your form, you will be contacted within 5 working days. Wherever appropriate, information will be sent to you on alternative courses if your first choice of course is full.

Note: It is advisable not to book any travel and/or accommodation until your place on the course has been confirmed.

5. Confirmation of booking

Approximately three weeks before the course is due to start you will be sent a set of **joining instructions**. It is important that you read these before the course as they include additional terms and conditions, they also provide a map and directions on how to get to the training centre.

For further information and terms and conditions of booking see page 122.

Customer Service

42–48 High Road, South Woodford,
London E18 2JP

tel: +44 (0)20 8989 8464

fax: +44 (0)20 8530 3052

email: customer.serv@cii.co.uk

If your question concerns technical advice on courses, in-house training and tailored courses, please contact face-to-face training (see contents page for details).

revision courses

your guide to making the right choice

Revision courses – your guide to making the right choice

The CII offers a variety of revision courses to enhance your chances of exam success. No two candidates are the same and, therefore, learning styles and preferences also differ. This is why the CII offers a choice of revision options suitable to different needs. In 2010, candidates who attended a CII revision course improved their chances of exam success by up to 50%*.

As a first step to choosing your revision course we recommend you:

- Look at the descriptions below and opposite which tell you the type of revision courses on offer;
- check which one is best suited to you and your learning style; then
- go to the individual exam revision course pages for the dates and prices.

Revision days

These revision courses provide a valuable aid to revision in the weeks before the exam and are designed to improve your chances of exam success. The programme is structured to concentrate on the key elements of the syllabus, suggestions for effective revision and techniques for the exam.

Revision workshops & evening classes

These revision workshops/evening classes provide a valuable aid to revision in the weeks before the exam and are designed to improve your chances of exam success. They are structured to provide face-to-face tuition concentrating on key elements of the syllabus, suggestions for effective revision

and techniques for the exam itself. The interactive nature of the course provides you with the opportunity to discuss specific elements with the tutor, practise answering questions and gain feedback on your answers.

Intensive revision courses

These intensive revision courses are ideal if you find it difficult to set aside regular time for study, providing a valuable aid to fast-track revision. They are structured to provide intensive face-to-face tuition concentrating on key elements of the syllabus in preparation for the exam. The tutor will also provide suggestions for effective revision and techniques for the exam itself which will aid your exam preparation.

The interactive nature of these courses provides you with the opportunity to discuss specific elements with the tutor, practise answering questions and gain feedback on your answers.

Important notes for revision course attendees:

Before attending any of the revision courses, please make sure you have purchased and studied the primary text as listed in the syllabus reading list. Remember the study text is not included in the delegate fee.

* Candidates sitting CII exams in 2010 after completing a Face-to-Face Training revision course achieved a success rate of up to 50% higher than those who did not attend the course.

Source: CII Statistics.

Clarify areas of concern in the syllabus

Discover what the examiner is looking for

Key benefits

Learn useful revision and exam techniques

Discuss the common mistakes made by candidates and how to avoid them

For bookings, enquiries and updates visit www.cii.co.uk/f2f alternatively call Customer Service on +44 (0)20 8989 8464.

To discuss technical, in-house and bespoke courses call Face-to-Face Training on +44 (0)20 7283 3117 or email face-to-facetraining@cii.co.uk

“ In 2010 the CII ran over 500 revision courses, helping in excess of 4,000 students pass their exams. ”



See what our delegates think...

Trainer had excellent knowledge

Really well organised and tailored day

The day has been very insightful

P86 workshop is the best interactive workshop I have attended

Gave useful direction for my exam preparation

Very well delivered and explained

Brilliant handouts and great tutor

Kept my attention throughout the day

Really assisted my studies

Best and most productive course I've attended

Made the complicated elements very simple



revision courses

general insurance qualifications

22 Foundation Insurance Test (FIT™)
22 Certificate in Insurance
22 Diploma in Insurance
24 Advanced Diploma in Insurance

26 Generic using formulae and practising
calculations course
26 Certificate in IT for Insurance
Professionals (CITIP)
28 Award in London Market Insurance

revision courses

general insurance qualifications

For a detailed description of the key features and benefits of the courses listed opposite, please refer to the section headed 'Revision courses – your guide to making the right choice' starting on page 18.

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Revision courses

general insurance qualifications

Foundation Insurance Test® (FIT™)

One day course

Revision days

Unit

FIT™

Cost: £205 members/£235 non-members

Certificate in Insurance

One day course

Revision days

Units

(IF1) Insurance, legal and regulatory

(IF2) General insurance business

(IF3) Insurance underwriting process

(IF4) Insurance claims handling process

Cost: £205 members/£235 non-members

'Fantastic course, tutor explained course material in real terms'

Tony, Senior Team Leader, May 10

Diploma in Insurance

One day course

Revision days

Units

(P05) Insurance law

(P21) Commercial insurance contract wording

(P80) Underwriting practice

(P81) Insurance broking practice

(P85) Claims practice

(P86) Personal insurances

(P90) Cargo and transit insurances

(P91) Aviation and space insurance

(P92) Insurance business and finance

(P93) Commercial property and business interruption

(P94) Motor insurance

(P96) Liability insurances

(P97) Reinsurance

Cost: £230 members/£270 non-members

'An enthusiastic tutor who made the day engaging and memorable'

James, Underwriting Technician, April 10

Two day course

Revision workshops

Units

(P05) Insurance law

(P97) Reinsurance

Cost: £410 members/£475 non-members

Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Venue	Dates
London	09 Feb/13 Apr/08 Jun/18 Aug/12 Oct/07 Dec

Venue	Dates
London	10 Jan/12 Apr/13 Jun/10 Oct/05 Dec
Glasgow	19 Apr/18 Oct
Manchester	01 Mar/02 Sep
London	08 Feb/12 May/14 Jul/11 Oct/06 Dec
Glasgow	20 Apr/20 Oct
Manchester	04 Mar/01 Sep
London	09 Feb/13 Apr/14 Jun/10 Aug/11 Oct/07 Dec
London	18 Feb/15 Jul

Venue	Dates
London	15 Mar/25 Mar/31 Mar/07 Apr/12 Sep/27 Sep/20 Sep
Birmingham	01 Apr
Glasgow	05 Apr
Manchester	29 Mar
London	24 Mar/19 Sep
London	31 Mar/02 Sep
London	05 Apr/09 Sep
London	05 Apr/11 Apr/23 Sep
London	08 Apr/21 Sep
London	23 Mar/26 Sep
London	30 Mar/29 Sep
London	30 Mar/12 Sep/19 Sep
London	24 Mar/22 Sep
London	23 Mar/28 Sep
London	06 Apr/30 Sep
London	30 Mar/28 Sep

Venue	Dates
London	22–23 Mar/21–22 Sep
London	05–06 Apr/20–21 Sep

revision courses

general insurance qualifications

Revision courses general insurance qualifications

Diploma in Insurance

Six week evening class



Evening classes

Unit

(P05) Insurance law

Cost: £370 members/£430 non-members for 6 classes

Advanced Diploma in Insurance

One day course

Revision days

Units

(510) Risk, regulation and capital adequacy – statistics

(510) Risk, regulation and capital adequacy – non-statistics

(530) Economics and business

(590) Principles of Takaful

(655) Risk management

(735) Life assurance

(815) Underwriting management

(820) Claims management (non-life)

(945) Marketing

(990) Insurance corporate management

Cost: £260 members/£300 non-members

Six week evening class

Evening classes

Units

(530) Business and economics

Cost: £370 members/£430 non-members for 6 classes

Eight week evening class

Evening classes

Unit

(510) Risk, regulation and capital adequacy

Cost: £370 members/£430 non-members for 8 classes

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Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Venue	Dates
London	Mondays 17.30–19.30
	April examination: 28 Feb/07 Mar/14 Mar/21 Mar/28 Mar/04 Apr
	October examination: 23 Aug/30 Aug/05 Sep/12 Sep/19 Sep/26 Sep

Venue	Dates
London	08 Mar/16 Mar/23 Mar/31 Mar/06 Sep/15 Sep/22 Sep/29 Sep
London	09 Mar/17 Mar/24 Mar/05 Apr/08 Sep/16 Sep/23 Sep/30 Sep
London	16 Mar/06 Apr/14 Sep/28 Sep
London	30 Mar/21 Sep
London	15 Mar/05 Apr/13 Sep/27 Sep
London	25 Mar/23 Sep
London	14 Mar/12 Sep
London	28 Mar/28 Sep
London	10 Mar/31 Mar/15 Sep/29 Sep
London	21 Mar/26 Sep

Venue	Dates
London	Wednesdays 17.30–19.30
	April examination: 02 Mar/09 Mar/16 Mar/23 Mar/30 Mar/06 Apr
	October examination: 24 Aug/31 Aug/07 Sep/14 Sep/21 Sep/28 Sep

Venue	Dates
London	Tuesdays 17.30–19.30
	April examination: 15 Feb/22 Feb/01 Mar/08 Mar/15 Mar/22 Mar/29 Mar/05 Apr
	October examination: 09 Aug/16 Aug/23 Aug/30 Aug/06 Sep/13 Sep/20 Sep/27 Oct

revision courses

general insurance qualifications

Revision courses general insurance qualifications

Advanced Diploma in Insurance

Two day course

Revision workshops

Units

(530) Economics and business

(655) Risk management

(815) Underwriting management

(820) Claims management (non-life)

(930) Insurance broking

Cost: £410 members/£475 non-members

Generic using formulae and practising calculations course

Ideal for students undertaking
Advanced Diploma unit 510.

One day course

Dates

14 Mar/12 Sep

Venue

London

Cost

£205 members/£235 non-members

Certificate in IT for Insurance Professionals (CITIP)

run in association with



The Chartered Institute for IT

Revision days

One day course

Dates

21 Mar/01 Apr/07 Apr/06 Sep/
20 Sep/26 Sep

Venue

London

Cost

£205 members/£235 non-members

For a detailed description of the key features and benefits of the courses listed opposite, please refer to the section headed 'Revision courses – your guide to making the right choice' starting on page 18.

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Venue	Dates
London	23–24 Mar/21–22 Sep
London	16–17 Mar/14–15 Sep
London	22–23 Mar/20–21 Sep
London	24–25 Mar/26–27 Sep
London	15–16 Mar/21–22 Sep
Glasgow	30–31 Mar/27–28 Sep
Manchester	07–08 Apr/20–21 Sep

Benefits

- Obtain a basic grounding in mathematical principles
- Discuss the common mistakes made by candidates and how to avoid them
- Clarify areas of concern in using formulae.

Course

This one day course provides a valuable grounding in mathematics and the use of formulae to improve your chance of exam success. It is a useful aid prior to attending a statistics revision day.

Who should attend?

Anyone currently studying for unit (510) Risk, regulation and capital adequacy, who requires a basic understanding of mathematics and would like practise in using the formulae.

Programme

- Basic mathematics
- Statistical formulae
- Practical exercises.

Benefits

At the end of the course you will have:

- Gained an understanding of potential IT applications in the insurance industry
- Obtained a broad understanding of IT
- Developed an understanding of the management benefits of using IT applications in the insurance industry.

Course

Developed jointly by the CII and The British Computer Society (BCS), the Certificate in IT for Insurance Professionals provides a broad understanding of the principles and use of IT in the insurance world.

Who should attend?

Everyone who needs to be aware of potential IT applications in the insurance industry. It will be particularly relevant if you have no formal IT qualifications and you:

- Are an IT user looking to expand your knowledge and understanding
- Have management responsibility for IT
- Provide IT assistance to colleagues
- Are increasingly involved in IT during your day-to-day work.

Programme

Section A

- Technical aspects of Information Technology
- Computing fundamentals
- Computer hardware
- Software
- Telecommunications and networking.

Section B

- Management of Information Technology
- Management considerations of IT in an organisation
- Data management and storage.

Section C

- Application of Information Technology in insurance
- Insurance applications
- Electronic commerce.

revision courses

general insurance qualifications

Revision courses general insurance qualifications

Award in London Market Insurance

One day course

Two day course

Six week evening class

Revision days

Units

(LM1) London market insurance essentials

(LM2) London market insurance principles and practices

Cost: £205 members/£235 non-members

Revision workshops

Units

(LM1) London market insurance essentials

(LM2) London market insurance principles and practices

Cost: £360 members/£410 non-members

Evening classes

Units

(LM1) London market insurance essentials

(LM2) London market insurance principles and practices

Cost: £370 members/£430 non-members for 6 classes

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Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Venue	Dates
London	02 Mar/09 Jun/31 Aug/08 Nov
London	06 Apr/06 Jul/18 Oct/06 Dec

Venue	Dates
London	27–28 Jan/03–04 Feb/31 May–01 Jun/25–26 Aug/01–02 Sep/01–02 Nov
London	31 Jan–01 Feb/26–27 May/02–03 Jun/30–31 Aug/27–28 Oct/03–04 Nov

Venue	Dates
London	Thursdays 17.30–19.30
	06 Jan/13 Jan/20 Jan/27 Jan/03 Feb/10 Feb
	28 Jul/04 Aug/11 Aug/18 Aug/25 Aug/01 Sep
London	Thursdays 17.30–19.30
	28 Apr/05 May/12 May/19 May/26 May/02 Jun
	29 Sep/06 Oct/13 Oct/20 Oct/27 Oct/03 Nov

revision courses

financial services qualifications

-
- 32 Certificate in Financial Planning
 - 34 Certificate in Mortgage Advice
 - 36 Diploma in Financial Planning
 - 40 Diploma in Regulated Financial Planning
 - 44 Advanced Diploma in Financial Planning

revision courses

financial services qualifications

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Revision courses financial services qualifications

Certificate in Financial Planning

One day course

'Thoroughly enjoyed the course, it was pitched at exactly the right level.'

Suky, Associate, July 10

'A rewarding interactive tuition session.'

John, Para Planner, May 10

Revision days

Units

(CF1) UK financial services, regulation and ethics

(CF2) Investment and risk

(R05) Financial protection

(CF4) Retirement planning

(CF5) Integrated financial planning

(CF6) Mortgage advice

(CF8) Long-term care insurance

(ER1) Equity release

(GR1) Group risk

Cost: £205 members/£235 non-members

Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Venue	Dates
London	07 Feb/06 Apr/06 Jun/01 Aug/10 Oct/05 Dec
Birmingham	07 Mar/05 Sep
Bristol	09 May/14 Nov
Leeds	14 Mar/14 Sep
Manchester	23 May/21 Nov
London	08 Feb/07 Apr/07 Jun/02 Aug/11 Oct/06 Dec
Birmingham	08 Mar/08 Sep
Bristol	10 May/15 Nov
Leeds	15 Mar/15 Sep
Manchester	24 May/22 Nov
London	10 Feb/08 Apr/09 Jun/03 Aug/13 Oct/07 Dec
Birmingham	23 Feb/27 May/24 Nov
Bristol	07 Apr/11 Oct
Leeds	26 Apr/27 Oct
Manchester	02 Feb/10 May/04 Nov
London	12 Jan/04 Mar/06 May/07 Jul/08 Sep/10 Nov
Birmingham	24 Feb/28 May/24 Nov
Bristol	14 Jan/08 Apr/05 Jul/12 Oct
Leeds	27 Apr/28 Oct
Manchester	04 Feb/11 May/09 Aug/04 Nov
London	11 Jan/29 Mar/12 May/28 Jun/29 Sep/11 Nov
Birmingham	25 Mar/27 Jun/26 Sep/03 Nov
Bristol	30 Mar/01 Jul/28 Sep
Leeds	31 Mar/29 Jun/27 Sep/07 Nov
Manchester	28 Mar/06 May/01 Jul/30 Sep
London	13 Jan/07 Mar/10 May/11 Jul/09 Sep/11 Nov
Birmingham	05 Feb/23 Sep
Bristol	04 Mar/23 Sep
Leeds	15 Apr/21 Oct
Manchester	20 Apr/20 Jul/28 Oct
London	20 May/11 Nov
London	06 Mar/11 Jul/13 Nov
London	15 Feb/23 Oct

revision courses

financial services qualifications

Revision courses financial services qualifications

Certificate in Financial Planning

Two and three day courses

Five day course



'Excellent, very helpful and informative.'
Stephen, IFA, June 10

Certificate in Mortgage Advice

One day course

Revision workshops

Units

(R05) Financial protection

(CF4) Retirement planning

(CF6) Mortgage advice

Cost: Two day course £360 members/
£410 non-members
Three day course £515 members/
£595 non-members

Intensive revision courses

Units

(CF1) UK financial services,
regulation and ethics

(CF2) Investment and risk

(CF5) Integrated financial planning

Cost: £825 members/£950 non-members

Revision days

Units

(CF1) UK financial services, regulation and ethics

(CF6) Mortgage advice

Cost: £205 members/£235 non-members

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Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Venue	Dates
London	28 Feb–01 Mar/05–06 Sep
London	01–02 Mar/14–15 Jun/06–07 Sep/28–29 Nov
London	14–16 Feb/25–27 May/17–19 Oct

Venue	Dates
London	11–15 Apr/17–21 Oct
London	09–13 May/24–28 Oct
London	10–14 Jan/21–25 Feb/11–15 Apr/16–20 May/04–08 Jul/19–23 Sep/14–18 Nov

Venue	Dates
London	07 Feb/06 Apr/06 Jun/01 Aug/10 Oct/05 Dec
Birmingham	07 Mar/05 Sep
Bristol	09 May/14 Nov
Leeds	14 Mar/14 Sep
Manchester	23 May/21 Nov
London	13 Jan/07 Mar/10 May/11 Jul/09 Sep/11 Nov
Birmingham	04 Feb/23 Sep
Bristol	04 Mar/23 Sep
Leeds	15 Apr/21 Oct
Manchester	20 Apr/20 Jul/28 Oct

revision courses

financial services qualifications

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Revision courses financial services qualifications

Diploma in Financial Planning

One day course

Revision days

Units

(J01) Personal tax

(J02) Trusts

(J03) The tax and legal aspects of business

(J04) Pension funding options

(J05) Pension income options

(J06) Investment principles,
markets and environment

(J07) Supervision in a regulated environment

Cost: £230 members/£270 non-members

'Really worthwhile course, as a delegate from outside of the industry the content was made clear and understandable.'

Mandy, Director, June 10

Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Venue	Dates
London	15 Mar/05 Jul/27 Sep
Birmingham	23 Mar/17 Jun/22 Sep
Bristol	05 Apr/22 Jun/26 Sep
Glasgow	17 Mar/16 Jun/29 Sep
Leeds	24 Mar/20 Jun/30 Sep
London	31 Mar/07 Jul/22 Sep
Birmingham	05 Apr/24 Jun/27 Sep
Bristol	29 Mar/30 Jun/26 Sep
Glasgow	30 Mar/21 Jun/15 Sep
Leeds	30 Mar/01 Jul/27 Sep
London	31 Mar/22 Sep
Birmingham	01 Apr/27 Sep
Bristol	29 Mar/23 Sep
Glasgow	11 Mar/12 Sep
Leeds	30 Mar/27 Sep
London	23 Mar/07 Jul /23 Sep/30 Sep
Birmingham	28 Mar/15 Jun/27 Sep
Bristol	08 Apr/27 Jun/29 Sep
Glasgow	22 Mar/14 Jun/23 Sep
Leeds	24 Mar/29 Jun/28 Sep
London	29 Mar/05 Apr/16 Jun/08 Jul/16 Sep/28 Sep
Birmingham	31 Mar/16 Jun/26 Sep
Bristol	31 Mar/28 Jun/26 Sep
Glasgow	06 Apr/15 Jun/22 Sep
Leeds	06 Apr/30 Jun/22 Sep
London	10 Mar/10 Jun/13 Sep
Birmingham	17 Mar/27 Jun/22 Sep
Bristol	23 Mar/23 Jun/23 Sep
Glasgow	30 Mar/22 Jun/30 Sep
Leeds	28 Mar/29 Jun/26 Sep
London	11 Mar/19 Sep
Manchester	03 Mar/30 Sep

revision courses

financial services qualifications

Revision courses financial services qualifications

Diploma in Financial Planning

Two day course

Revision workshops

Units

(J01) Personal tax

(J02) Trusts

(J03) The tax and legal aspects of business

(J04) Pension funding options

(J05) Pension income options

(J06) Investment principles, markets
and environment

(J07) Supervision in a regulated environment

Cost: £385 members/£445 non-members

**'Covered the areas and techniques needed
for the exam...excellent preparation.'**

Peter, Financial Adviser, October 10

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Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Venue	Dates
London	28–29 Mar/04–05 Jul/19–20 Sep
Birmingham	24–25 Mar/12–13 Jul/22–23 Sep
Bristol	30–31 Mar/13–14 Jun/15–16 Sep
Glasgow	17–18 Mar/13–14 Jun/20–21 Sep
Leeds	22–23 Mar/15–16 Jun/26–27 Sep
London	06–07 Apr/27–28 Jun/28–29 Sep
Birmingham	21–22 Mar/21–22 Jun/20–21 Sep
Bristol	15–16 Mar/06–07 Jun/19–20 Sep
Glasgow	04–05 Apr/23–24 Jun/27–28 Sep
Manchester	07–08 Apr/08–09 Jun/13–14 Sep
London	21–22 Mar/26–27 Sep
Birmingham	24–25 Mar/22–23 Sep
Leeds	17–18 Mar/19–20 Sep
London	16–17 Mar/30 Jun–01 Jul/19–20 Sep
Birmingham	05–06 Apr/30 Jun–01 Jul/15–16 Sep
Bristol	24–25 Mar/23–24 Jun/13–14 Sep
Glasgow	15–16 Mar/09–10 Jun/22–23 Sep
Leeds	28–29 Mar/13–14 Jun/19–20 Sep
London	14–15 Mar/05–06 Jul/13–14 Sep
Birmingham	28–29 Mar/28–29 Jun/28–29 Sep
Bristol	21–22 Mar/21–22 Jun/19–20 Sep
Glasgow	23–24 Mar/27–28 Jun/29–30 Sep
Manchester	10–11 Mar/16–17 Jun/26–27 Sep
London	05–06 Apr/11–12 Apr/30 Jun–01 Jul/19–20 Sep
Birmingham	21–22 Mar/21–22 Jun/26–27 Sep
Bristol	05–06 Apr/13–14 Jun/22–23 Sep
Glasgow	21–22 Mar/27–28 Jun/28–29 Sep
Leeds	24–25 Mar/23–24 Jun/28–29 Sep
London	11–12 Apr/20–21 Sep
Manchester	07–08 Apr/19–20 Sep

revision courses

financial services qualifications

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Revision courses financial services qualifications

Diploma in Financial Planning

One day course (Saturdays)

Saturday revision days

Units

(J01) Personal tax

(J04) Pension funding options

(J05) Pension income options

(J06) Investment principles, markets and environment

Cost: £230 members/£270 non-members

Diploma in Regulated Financial Planning

One day course

Revision days

Units

(R01) Financial services, regulation and ethics



(R02) Investment principles and risk

(R03) Personal taxation

(R04) Pensions and retirement planning

(R05) Financial protection

(R06) Financial planning practice

Cost: £230 members/£270 non-members

Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Venue	Dates
London	12 Mar/09 Jul/10 Sep
London	12 Mar/09 Jul/10 Sep
London	19 Mar/16 Jul/24 Sep
London	19 Mar/25 Jun/17 Sep

Venue	Dates
London	16 Feb/16 Mar/13 Apr/11 May/15 Jun/13 Jul/10 Aug/14 Sep/12 Oct/16 Nov
Birmingham	09 Mar/08 Jun /07 Sep/06 Dec
Bristol	10 Mar/09 Jun/08 Sep/05 Dec
Glasgow	07 Mar/07 Jun/05 Sep/02 Dec
Leeds	08 Mar/10 Jun/06 Sep/01 Dec
London	10 Mar/10 Jun/13 Sep
Birmingham	17 Mar/27 Jun/22 Sep
Bristol	23 Mar/23 Jun/23 Sep
Glasgow	30 Mar/22 Jun/30 Sep
Leeds	28 Mar/29 Jun/26 Sep
London	17 Feb/17 Mar/14 Apr/12 May/16 Jun/14 Jul/11 Aug/15 Sep/13 Oct/17 Nov
Birmingham	05 Apr/05 Jul/04 Oct/22 Nov
Bristol	06 Apr/06 Jul/05 Oct/23 Nov
Glasgow	04 Apr/04 Jul/03 Oct/24 Nov
Leeds	07 Apr/07 Jul/06 Oct/25 Nov
London	10 Jan/01 Mar/05 May/30 Jun/04 Jul/02 Sep/01 Nov
Birmingham	08 Feb/09 May/10 Aug/09 Nov
Bristol	09 Feb/10 May/11 Aug/10 Nov
Glasgow	07 Feb/11 May/08 Aug/08 Nov
Leeds	10 Feb/12 May/09 Aug/07 Nov
London	10 Feb/08 Apr/09 Jun/03 Aug/13 Oct/07 Dec
Birmingham	23 Feb/27 May/24 Nov
Bristol	07 Apr/11 Oct
Leeds	26 Apr/27 Oct
Manchester	02 Feb/10 May/04 Nov
London	10 Feb/21 Mar/08 Apr/09 Jun/20 Jun/03 Aug/24 Nov/19 Sep/13 Oct/07 Dec
Birmingham	23 Feb/27 May/24 Nov
Bristol	16 Mar/07 Apr/16 Jun/14 Sep/11 Oct
Leeds	22 Mar/21 Jun/15 Sep
Manchester	22 Mar/26 Apr/21 Jun/15 Sep/27 Oct

revision courses

financial services qualifications

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Revision courses financial services qualifications

Diploma in Regulated Financial Planning

Two day course

One day course (Saturdays)

Revision workshops

Units

(R01) Financial services, regulation and ethics

(R02) Investment principles and risk

(R03) Personal taxation

(R04) Pensions and retirement planning

(R05) Financial protection

(R06) Financial planning practice

Cost: £385 members/£445 non-members

Saturday revision days

Units

(R01) Financial services, regulation and ethics

(R02) Investment principles and risk

(R06) Financial planning practice

Cost: £230 members/£270 non-members

Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Venue	Dates
London	07-08 Feb/09-10 May/08-09 Aug/07-08 Nov
Birmingham	01-02 Mar/07-08 Jun/06-07 Sep/05-06 Dec
Bristol	02-03 Mar/08-09 Jun/07-08 Sep/06-07 Dec
Glasgow	03-04 Mar/09-10 Jun/08-09 Sep/07-08 Dec
Leeds	28 Feb-01 Mar/06-07 Jun/05-06 Sep/29-30 Nov
London	11-12 Apr/30 Jun-01 Jul/19-20 Sep
Birmingham	21-22 Mar/21-22 June/26-27 Sep
Bristol	05-06 Apr/13-14 Jun/22-23 Sep
Glasgow	21-22 Mar/27-28 Jun/27-28 Sep
Leeds	24-25 Mar/24-25 Jun/28-29 Sep
London	14-15 Feb/16-17 May/15-16 Aug/14-15 Nov
Birmingham	08-09 Mar/14-15 Jun/13-14 Sep/28-29 Nov
Bristol	07-08 Mar/13-14 Jun/12-13 Sep/29-30 Nov
Glasgow	09-10 Mar/15-16 Jun/14-15 Sep/30 Nov-01 Dec
Leeds	10-11 Mar/16-17 Jun/15-16 Sep/01-02 Dec
London	01-02 Mar/07-08 Jun/06-07 Sep/05-06 Dec
Birmingham	02-03 Mar/08-09 Jun/07-08 Sep/06-07 Dec
Bristol	03-04 Mar/09-10 Jun/08-09 Sep/07-08 Dec
Glasgow	24-25 Feb/06-07 Jun/05-06 Sep/29-30 Nov
Leeds	07-08 Feb/09-10 May/08-09 Aug/07-08 Nov
London	28 Feb-01 Mar/05-06 Sep
London	17-18 Mar/09-10 Jun/13-14 Sep
Birmingham	10-11 Mar/15-16 Jun/05-06 Oct
Bristol	06-07 Apr/13-14 Jun/19-20 Sep
Glasgow	30-31 Mar/30 Jun-01 Jul/08-09 Sep
Leeds	21-22 Mar/23-24 Jun/28-29 Sep

Venue	Dates
London	12 Mar/09 Jul/10 Sep
London	19 Mar/25 Jun/17 Sep
London	19 Mar/25 Jun/17 Sep

revision courses

financial services qualifications

For a detailed description of the key features and benefits of the courses listed opposite, please refer to the section headed 'Revision courses – your guide to making the right choice' starting on page 18.

For bookings, enquiries and updates visit www.cii.co.uk/f2f or call Customer Service on +44 (0)20 8989 8464.

To discuss technical, in-house and bespoke courses call Face-to-Face Training on +44 (0)20 7283 3117 or email face-to-facetraining@cii.co.uk

Revision courses financial services qualifications

Advanced Diploma in Financial Planning

One day course

Two day course

Revision days

Units

(AF1) Personal tax and trust planning

(AF2) Business planning

(AF3) Pension planning

(AF4) Investment planning

(AF5) Financial planning process

Cost: £260 members/£300 non-members

Revision workshops

Units

(AF1) Personal tax and trust planning

(AF2) Business planning

(AF3) Pension planning

(AF4) Investment planning

(AF5) Financial planning process

Cost: £410 members/£470 non-members

Training courses attract up to 25 CPD credits and can also be run in-house at your premises

	Venue	Dates
	London	24 Mar/19 Sep
	Birmingham	29 Sep
	Bristol	31 Mar
	Leeds	07 Apr
	Manchester	29 Sep
	London	29 Mar/22 Sep
	London	06 Apr/22 Sep
	Birmingham	06 Apr
	Leeds	20 Sep
	London	31 Mar/20 Sep
	Bristol	07 Mar
	Edinburgh	09 Sep
	London	07 Mar/30 Sep
	Glasgow	30 Mar
	Manchester	30 Mar

	Venue	Dates
	London	15–16 Mar/13–14 Sep
	Birmingham	22–23 Mar
	Bristol	27–28 Sep
	Glasgow	05–06 Apr
	Leeds	21–22 Mar/20–21 Sep
	London	05–06 Apr/20–21 Sep
	London	24–25 Mar/26–27 Sep
	Birmingham	05–06 Apr/14–15 Sep
	Leeds	21–22 Mar/19–20 Sep
	London	10–11 Mar/26–27 Sep
	Bristol	23–24 Mar/20–21 Sep
	Edinburgh	28–29 Mar/26–27 Sep
	London	09–10 Mar/08–09 Sep
	Glasgow	30–31 Mar/26–27 Sep
	Manchester	28–29 Mar/28–29 Sep

Anyone sitting a written exam, such as units at Diploma or Advanced Diploma level, or the Certificate in Financial Planning unit (CF5) Integrated financial planning, needs to be sure their technique is up to scratch, especially if they have not taken an exam for some time. On these courses candidates learn techniques for studying, revising and answering essay-style exam questions.

study techniques

48 Exam techniques
(short-answer and
essay-style questions)

48 How to study course

study techniques course

Study techniques course

Exam techniques

(short-answer and essay-style questions)

Half day course (morning)

Dates

08 Mar/14 Sep

Venue

London

Cost

£155 members/£175 non-members

Benefits

- Learn useful revision techniques
- Practise answering questions
- Discover what the examiner is looking for
- Discuss the common mistakes made by candidates and how to avoid them.

Who should attend?

Anyone sitting (CF5) Integrated financial planning or units within the Diploma in Insurance, Advanced Diploma in Insurance and Advanced Diploma in Financial Planning.

Course

This course is designed to refine your performance in the exams and is not unit specific. The focus is on general best practice and on tackling short-answer and essay-style questions as found in the exams of certain CII qualifications.

How to study course

(Certificate/Diploma in Financial Planning courses)

Half day course (morning)

Dates

Certificate: 18 Jan/24 Feb/12 May/
20 Jul/18 Aug/18 Nov/08 Dec

Diploma: 21 Jan/21 Apr/08 Jul

Venue

London

Cost

£155 members/£175 non-members

Benefits

- Identify your preferred learning style
- Learn how to retain information learnt
- Identify key syllabus areas to learn
- Use suggested learning activities
- Overcome any difficulties or anxieties about formal studying.

The focus is on identifying the key parts of the syllabus and learning material and finding the best approach for each individual to learn and retain information. The session will NOT include any unit revision or unit specific information.

Who should attend?

Anyone planning to commence their studies for CII Certificate level financial planning Diploma units. Ideally suited to those who are looking to increase their level of qualification in line with the FSA's Retail Distribution Review.

Course

This course is designed for students who are about to start studying for a CII financial planning exam, particularly those who are returning to studying after a long gap.

For bookings, enquiries and updates visit www.cii.co.uk/f2f or call Customer Service on +44 (0)20 8989 8464.

To discuss technical, in-house and bespoke courses call Face-to-Face Training on +44 (0)20 7283 3117 or email face-to-facetraining@cii.co.uk

Training courses can be run in-house at your premises and attract up to 25 CPD credits

foundation courses

General insurance

- 50 Introduction to the London market
- 50 A brief introduction to insurance
- 50 Introduction to insurance practice
- 52 Introduction to personal insurance
- 52 Introduction to commercial insurance
- 52 Introduction to reinsurance
- 54 Introduction to underwriting

- 54 A brief introduction to insurance company accounts

- 56 Introduction to claims management
- 56 Essential writing skills

Financial services

- 58 Introduction to life assurance
- 58 Introduction to pensions

foundation courses

general insurance

Foundation courses general insurance

Introduction to the London market



Half day course (afternoon)

Dates

04 Feb/28 Apr/01 Jul/09 Sep/04 Nov

Venue

London

Cost

£130 members/£150 non-members

A brief introduction to insurance



Half day course (morning)

Dates

04 Feb/28 Apr/01 Jul/09 Sep/04 Nov

Venue

London

Cost

£130 members/£150 non-members

Introduction to insurance practice

One day course

Dates

14 Feb/09 May/11 Jul/14 Nov

Venue

London

Cost

£205 members/£235 non-members

For bookings, enquiries and updates visit www.cii.co.uk/f2f or call Customer Service on +44 (0)20 8989 8464.

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Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Benefits

At the end of the course you will have:

- Gained a brief but comprehensive view of the London market and its future role
- Built foundation knowledge of the London market.

It is recommended that this course is combined with the course 'A brief introduction to insurance'.

Course

This course provides a valuable overview of the development of the London market necessary to understand current practice. The session will give an insight into the key issues facing the market today and in the future.

Who should attend?

Ideal for any new entrant to a Lloyd's syndicate, broker, insurer, reinsurer, accountant or loss adjuster, to enable them to understand the London market and current market practice.

Programme

- The development of the London market
- The who, what and why of
 - Lloyd's
 - International Underwriting Association
- The role of the broker including ethical considerations
- The international nature of London – current issues and trends in the London market
- The future, including electronic trading/support.

Follow-on course

- A brief introduction to insurance.

Benefits

At the end of the course you will have gained an excellent grounding in insurance principles and practice.

It is recommended that this course is combined, where appropriate, with the 'Introduction to the London market'.

Course

This course provides an overview of the basic principles of insurance and an introduction to insurance practice.

Who should attend?

Any new entrant to the insurance or reinsurance industry working directly in the market or in a supporting area.

Programme

- The basic principles of insurance
 - terminology
 - policy structure
 - the key forms of insurance
- Reinsurance and its purpose.

Follow-on course

- Introduction to the London market.

Benefits

At the end of the course you will have:

- Obtained a broad knowledge of the recent developments in insurance
- Gained an understanding of the different insurance products and covers available
- Gained an essential perspective of current market practices.

Course

This course provides an overview of the development of the insurance market and the necessary historical perspective to understand current practice. It will provide an insight into the key issues facing the market today and into the future.

The programme is presented in an informal style with delegate participation encouraged via group discussion.

Who should attend?

This is ideal for anyone who is new to the insurance industry or administrative staff working directly in the market or supporting areas.

Programme

- Risk and insurance
- General nature of insurance
- Types of insurance cover
- The insurance market
- How insurance operates – documentation
- Underwriting and risk sharing
- Statutory and voluntary regulation
- Legal aspects of insurance.

Follow-on courses

- Introduction to personal lines, disputes and the impact of fraud (introductory)
- Introduction to commercial insurance
- Introduction to reinsurance.

foundation courses

general insurance

Foundation courses general insurance

Introduction to personal insurance

One day course

Dates

15 Feb/10 May/12 Jul/15 Nov

Venue

London

Cost

£205 members/£235 non-members

Introduction to commercial insurance

One day course

Dates

16 Feb/11 May/13 Jul/16 Nov

Venue

London

Cost

£205 members/£235 non-members

'Wonderful course, timed well, good rapport with the tutor who handled our questions expertly.'

Vanessa, Underwriter, February 10

Introduction to reinsurance

One day course

Dates

03 Mar/16 Jun/08 Sep/17 Nov

Venue

London

Cost

£205 members/£235 non-members

For bookings, enquiries and updates visit www.cii.co.uk/f2f or call Customer Service on +44 (0)20 8989 8464.

To discuss technical, in-house and bespoke courses call Face-to-Face Training on +44 (0)20 7283 3117 or email face-to-facetraining@cii.co.uk

Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Benefits

At the end of the course you will have:

- Obtained a broad knowledge of the developments in personal insurance
- Gained an understanding of household and travel insurance and the role of the Financial Ombudsman Service
- Gained an awareness of the impact of fraud and the industry's steps to combat fraud.

Course

This course provides an overview of the development of the personal insurance market. It will provide a summary of personal insurance and will provide an insight into the key issues facing the market today and in the future.

The programme is presented in an informal style with delegate participation encouraged via group discussion.

Who should attend?

This is ideal for anyone who is new to the insurance industry or administrative staff working directly in the market or supporting areas.

Programme

- The personal lines market
- Household insurance, optional extensions and legal liability cover
- Travel insurance and disputes
- Claims procedures
- Impact of fraud and use of CUE, Art Loss Register and Insurance Fraud Bureau.

Benefits

At the end of the course you will have:

- Obtained a broad knowledge of commercial insurance
- Gained an understanding of commercial insurance products and covers available
- Gained an essential perspective of current market practices.

Course

This course provides an overview of the development of the commercial insurance market necessary to understand current practice. It will provide an insight into the key issues facing the market today and in the future.

Who should attend?

This is ideal for anyone who is new to the insurance and reinsurance industry or administrative staff working directly in the market or supporting areas.

Programme

- The commercial insurance market
- Property insurance
- General principles
 - fire and special perils
 - all risks
 - theft
 - money
 - goods in transit
- Business interruption
 - basic concepts
 - calculating a gross profit sum insured
 - basic perils insured
 - the indemnity period
 - underwriting considerations and the basis of rating
- Liability policies
 - how liability arises
 - employers' liability
 - public liability
 - product liability.

Benefits

At the end of the course you will have:

- Obtained knowledge on reinsurance
- Gained an understanding of how the current market practice has developed.

Course

This course provides an overview of the development of the reinsurance market necessary to understand current practice. It will provide an insight into the key issues facing the market today and in the future.

Who should attend?

This is ideal for anyone who is new to the insurance and reinsurance industry or administrative staff working directly in the market or supporting areas.

Programme

- The development and general principles of reinsurance
- Facultative reinsurance
- Treaty reinsurance
- Proportional reinsurance
- Non-proportional reinsurance.

foundation courses

general insurance

Foundation courses general insurance

Introduction to underwriting

One day course

Dates

17 Jun/18 Nov

Venue

London

Cost

£205 members/£235 non-members

A brief introduction to insurance company accounts

One day course

Dates

17 May/25 Oct

Venue

London

Cost

£205 members/£235 non-members

For bookings, enquiries and updates visit www.cii.co.uk/f2f or call Customer Service on +44 (0)20 8989 8464.

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Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Benefits

On completion of the course delegates will be able to:

- Understand the role of the underwriter
- Understand what underwriting skills are required
- Understand the principles of pricing
- Understand how business is placed in the London market
- Outline underwriting controls
- Outline reinsurance and reserving strategies
- Outline managing exposure.

Course

This course provides an excellent introduction to the principles and practices involved in underwriting business and includes a section on the London market. The course concentrates on generic underwriting and does not concentrate on the technical aspects of any one class. The course format will be a presentation with discussion and relevant case studies.

Who should attend?

The course is suitable for anyone who needs an understanding of the principles of underwriting and assumes no prior knowledge. It is also relevant for anyone who works in underwriting or broking who needs knowledge of the subject.

Programme

- The underwriter – role, duty and authority
- Underwriting skills – selecting, pricing, financial understanding, relationship and portfolio management, negotiating and influencing
- The principles of pricing
- Underwriting controls
- Reinsurance and reserving strategies
- Managing exposures
- How risks are placed in London and the underwriters role in this practice.

Benefits

At the end of the course you will have:

- Gained an understanding of the key elements of insurance financial statements
- Gained an appreciation of the key issues with regard to the interpretation of accounts
- Gained an awareness of the regulatory and supervisory framework
- Gained a basic understanding of insurance technical provisions.

Course

This course provides delegates with an introduction to the knowledge required to produce, understand and interpret insurance company accounts.

The course will provide a basic overview of the key aspects of insurance company accounts, including the regulatory and supervisory framework and insurance technical provisions.

It also gives an insight into key issues to consider when assessing insurance company accounts.

Who should attend?

Anyone whose role requires them to be able to understand, interpret or assist in the production of insurance company accounts.

Programme

- Preparation of insurance financial statements
- Timescale of policies issued and claims settled
- Recommended accounting practices for short and long term business
- Revenue accounts for separate classes of business
- Gross account and reinsurance thereof inside or outside the country
- Balance sheets, including investments
- Layout of the accounts
- Key issues regarding the regulatory and supervisory framework, EU Directives, accounting standards for insurance, solvency requirements
- Insurance technical provisions, for example, unearned premium, unexpired risks, outstanding claims, claims handling expenses, discounting, incurred but not reported losses, catastrophe reserves
- Key issues regarding the interpretation of accounts, e.g. solvency, profitability, liquidity and security
- Overview of credit ratings.

foundation courses

general insurance

Foundation courses general insurance

Introduction to claims management

One day course

Dates

02 Mar/27 Jul

Venue

London

Cost

£205 members/£235 non-members

Essential writing skills

Half day course (morning)

Dates

31 Jan/13 Jun/17 Oct

Venue

London

Cost

£155 members/£175 non-members

For bookings, enquiries and updates visit www.cii.co.uk/f2f or call Customer Service on +44 (0)20 8989 8464.

To discuss technical, in-house and bespoke courses call Face-to-Face Training on +44 (0)20 7283 3117 or email face-to-facetraining@cii.co.uk

Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Benefits

- Obtain knowledge of how principles of insurance are applied to claims practices
- Gain an understanding of basic fraud issues.

Course

Designed to develop a practical working knowledge of the handling and management of claims. Certain fundamentals of the claims business are covered which, when understood, will allow for consistent practice.

Who should attend?

This course is suited for those employed in personal lines business who wish to understand how the theory of claims is put into practice. It will benefit individuals seeking to better understand the activities of a claims department.

Programme

- The principles of insurance as they apply in practice
 - problems with indemnity
 - what happened to utmost good faith
 - subrogation
- The compensation culture
- Important legal cases on negligence and liability
- Prudent reserving
- Spotting and handling fraud
- Fraud detection systems
 - Hunter
 - Score
 - VSA.

Benefits

- Gain an understanding of the way that letters and documents can be expressed in the clearest, most unambiguous language
- Demonstrate this understanding through the use of a series of drafting exercises
- Learn how to display complex insurance related data clearly
- Avoid disputes with clients by ensuring that correspondence is clear and unambiguous.

Who should attend?

This session is ideal for anyone who is involved in drafting letters, proposals and reports.

Programme

- Editing out surplus words
- Sentence construction and length
- When to tabulate sentences
- Jargon and unusual vocabulary
- The active and passive voice.

foundation courses

financial services

Foundation courses financial services

Introduction to life assurance

One day course

Dates
26 Apr/25 Oct
Venue
London
Cost
£205 members/£235 non-members

Introduction to pensions

One day course

Dates
27 Apr/26 Oct
Venue
London
Cost
£205 members/£235 non-members

'The course was great as the detail was up to the minute and we could apply it to our roles.'

Charlotte, Pensions Administrator, April 10

For bookings, enquiries and updates visit www.cii.co.uk/f2f or alternatively call Customer Service on +44 (0)20 8989 8464.

To discuss technical, in-house and bespoke courses call Face-to-Face Training on +44 (0)20 7283 3117 or email face-to-facetraining@cii.co.uk

Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Benefits

At the end of the course you will have:

- Obtained knowledge on life products
- Gained an understanding of how the current market practice has developed
- Gained an understanding of consumer protection legislation.

Course

This course will provide an overview of the development of the life assurance market necessary to understand current practice.

It will provide an insight into the key issues facing the market today and into the future. It provides an overview of key components of life assurance.

The programme is presented in an informal style with delegate participation encouraged via group discussion.

Who should attend?

This is ideal for anyone who is new to the financial services industry or administrative staff working directly in the market or supporting areas.

Programme

- Areas of financial planning for individuals
- Term assurance
- Whole of life assurance
- Endowment assurance
- 'With Profits' and 'Unit Linked'
- Annuities
- Current issues in the market.

Benefits

At the end of the course you will have:

- Obtained knowledge of pension products
- Gained an understanding of how current market practice has developed
- Gained an understanding of consumer protection legislation.

Course

This course will provide an overview of the development of the pensions market necessary to understand current practice. It will provide an insight into the key issues facing the market today and into the future.

The programme is presented in an informal style with delegate participation encouraged via group discussion.

Who should attend?

This is ideal for anyone who is new to the financial services industry or administrative staff working directly in the market or supporting areas.

Programme

- State provision
- Stakeholder pensions
- Occupational pensions
- Defined benefits
- Defined contribution
- AVC/FSAVC
- Personal pensions
- Current issues in the market.

The UK's pre-eminence in the global insurance market makes it the destination of choice for numerous international students and employees keen to learn about the industry and gain a global perspective of insurance matters. The CII offers a suite of courses to help familiarise such individuals with the main issues and to provide an essential platform for further learning and development.

international courses

62 International insurance and reinsurance

64 English for the insurance industry

64 International liability insurance

international courses

International programmes

International insurance and reinsurance



Four week course

Dates

01–26 Aug

Venue

London

Cost

£4,865 members/£5,610 non-members

'Excellent materials and great practical exercises... my next booking is for the Oil workshop.'

Giuacer, Claims Analyst – Venezuela, Aug 10

For bookings, enquiries and updates visit www.cii.co.uk/f2f or call Customer Service on +44 (0)20 8989 8464.

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Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Benefits

This course will provide:

- Fast-track upgrading of existing knowledge of insurance and reinsurance
- Extensive and intensive coverage of principal areas of insurance and reinsurance business
- An extremely valuable networking opportunity with delegates coming from many different countries.

Course

An intensive programme which provides extensive coverage of the principal areas of non-life insurance. Expert tutors, including senior consultants and specialist market practitioners present this programme.

Who should attend?

The course is intended for delegates who hold junior management positions or those who have management potential.

Delegates must have a good knowledge of the English language and have an understanding of the principles of insurance. Experience of one or more of the major classes of general insurance is an advantage.

Programme

Introduction

- The UK insurance market
- Basic insurance principles.

Fire and extra perils insurances

- Fire insurance
 - modern practice
 - standard perils
 - common extension clauses
 - insurance of stock on declaration terms
 - collective and blanket policies
- Fire insurance underwriting
 - principles and practice
 - modern developments and trends
- Extra perils including ‘all risks’
 - range and scope
 - underwriting considerations and practice
- Fire hazards and surveying
 - general and industrial
 - preparation of plans and reports.

Business interruption insurance

- Basic theory
 - the effect of interruption on earning power
 - variable and standing charges
- The standard BI policy
 - cover, definitions, specification
 - difference basis for gross profit
 - application of ‘average’
 - special circumstances clause
- Extra perils, extensions and special covers
- Insurance of the payroll
- Underwriting and rating
 - interruption risk
 - basis rate
 - profits rate
 - effect of indemnity period.

Theft and money insurances

- Covers available
- Underwriting, surveying and security features
- Risk assessment.

Motor insurance

- Policy covers
- Selection of risks
- Rating features.

Contractors ‘all risks’ insurance

- Perils insured
- The insurance of plant and equipment
- Underwriting and rating
- The development of business.

Liability insurances

- Public liability
 - types of policy
 - problems in assessment of risk
 - underwriting and rating features.
- Products liability
 - the legal position of wholesalers, manufacturers, retailers, customers and consumers
 - underwriting considerations
 - consequential loss.
- Employers’ liability and workmen’s compensation comparison
 - legal background
 - standard policy covers
 - underwriting problems
 - surveys and accident prevention.

Marine insurance

- Marine insurance associations
- Marine hull and cargo insurances
- Clauses and policy forms
- Underwriting practice
- Marine claims
- The market.

Aviation insurance

- Law and market
- Aviation hull insurance
- Policy covers, underwriting practice and methods of rating.

Risk management

- Risk identification
- Risk avoidance
- Risk reduction.

Personal insurances

- Household insurance
- Travel insurance.

Reinsurance

- The nature and functions of reinsurance
 - facultative reinsurance
 - proportional and excess of loss treaties
 - principles and practice of rating
 - legal principles
- Non-traditional methods of risk transfer
 - captives
 - alternative risk transfer.

Free days and visits

The course programme allows two free days in addition to weekends. The course also includes a visit to Lloyd’s, and the headquarters of the CII in London.

Follow-on courses

- Role specific courses as listed in this directory
- English for the insurance industry, see overleaf.

international courses

International programmes

English for the insurance industry

Five day course

Dates
25–29 Jul
Venue
London
Cost
£2,000 members/£2,300 non-members

run in association with



International liability insurance

Three day course

Dates
23–25 May
Venue
London
Cost
£1,300 members/£1,440 non-members

For bookings, enquiries and updates visit www.cii.co.uk/f2f or call Customer Service on +44 (0)20 8989 8464.

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Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Benefits

This course will:

- Improve your insurance English in an authentic and practical context
- Include a visit to Lloyd's
- Provide extensive English practice with English as a Foreign Language (EFL) and insurance experts.

Course

An intensive English language training programme for international executives in the insurance industry. The course combines specialist English language training with technical insurance sessions to place the use of English in the context of the international insurance industry.

Who should attend?

Those who need to have an understanding of the insurance industry and the common terminology within it, but for whom English is a foreign language.

Programme

Specialist English sessions

- The insurance industry: roles, structures and responsibilities
- Key insurance terminology: classes, processes and principles
- Discussing recent and future trends in insurance
- The language of claims: management and processing
- Language review and delegate presentations.

Insurance sessions

- Lloyd's and the London market
- Developments in insurance and reinsurance
- Disaster scenarios including financial implications.

To book a place please contact the course manager at Communicaid
tel: +44 (0)20 7648 2140
fax: +44 (0)20 7648 2178
email: insurance@communicaid.com

Benefits

At the end of the course you will have:

- Developed solutions to some of the more complex issues that arise in the liability insurance market
- Gained an insight into international comparisons of the different classes of liability insurance business.

Course

After an overview, the different subjects are covered by means of case studies, discussions and audio-visual aids. The European, UK, Continental and other legal systems are compared as are the various products on the international market today.

Who should attend?

Those with experience from insurance companies, brokers and Lloyd's underwriters with responsibility in this complex area of insurance.

Programme

- Compulsory classes of cover – international comparisons
- General problems facing liability insurers, including long-tail claims, gradually developing diseases, pollution and environmental liabilities
- Employers' liability and workmen's compensation insurance
- Public and product liability insurance
- Pollution and environmental liabilities
- Professional liabilities
- Sources of liabilities and current legal issues
- Assessment of damages, claims estimating and claims handling.

The insurance industry is a complex and varied market made up of specialisms, each with its own unique risk considerations, policy coverage, market practices and legal considerations. The CII has devised a portfolio of courses which provide a thorough understanding of such areas; helping candidates develop the expertise they need if they are to flourish in these demanding roles.

Every course offered by the CII is regularly reviewed and updated to ensure it remains strictly relevant to the demands of today's market.

aviation, marine and energy courses

-
- | | |
|--|------------------------------------|
| 68 Marine insurance (introductory) | 74 Yacht insurance (intermediate) |
| 68 Marine law (introductory) | 74 Marine liability (intermediate) |
| 70 Hull and yacht insurance (introductory) | 76 Marine cargo (intermediate) |
| 70 Marine liability (introductory) | 76 Marine hull (intermediate) |
| 70 Cargo insurance (introductory) | 76 Oil workshop (intermediate) |
| 72 Specie insurance (introductory) | 78 Oil workshop (advanced) |
| 72 Energy insurance (introductory) | |
| 72 Aviation insurance (introductory) | |
| 74 Intensive marine insurance (introductory) | |

aviation, marine and energy courses

Aviation, marine and energy courses

Marine insurance (introductory)



Half day course (morning)

Dates

21 Feb/25 Oct

Venue

London

Cost

£130 members/£150 non-members

Marine law (introductory)

Half day course (afternoon)

Dates

21 Feb/25 Oct

Venue

London

Cost

£130 members/£150 non-members

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Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Benefits

At the end of the course you will have:

- Gained an understanding of the basics of marine insurance and the various types of risks included within this definition
- Gained an overview of the various markets available
- Obtained maximum benefit from experienced market speakers
- Obtained an extensive overview of the marine business and the related terminology.

Course

This course is designed to introduce delegates who are new to the basics of marine insurance, but would be suitable for those familiar with non-marine insurance who wish to find out more about marine.

Who should attend?

Anyone who is new to marine insurance.

No experience necessary although some general knowledge of insurance would be helpful.

Programme

- Overview of basic insurance terminology and concepts such as insurable interest highlighting the key differences between marine and non-marine insurance in certain areas
- Why the Marine Insurance Act is unique, and introduction to some of the key sections
- What risks are defined as marine?
- What types of business does marine insurance protect?
- Who purchases marine insurance and why?
- Where marine risks are insured and how the various different types of insurers fit together
- How the mix of insurers changed over the last 10 years.

Benefits

At the end of the course you will have:

- Gained an understanding of international maritime law and how it affects insurance
- Gained maximum benefit from experienced market speakers
- Obtained thorough introductory knowledge of maritime law, the associated terminology and the application to the marine insurance business.

Course

This course is designed to introduce delegates with little or no legal knowledge to the basics of international and national maritime law.

Who should attend?

Those starting out as marine claims adjusters or brokers, or personnel on the placing or underwriting side at any level who want an overview of the underlying legal framework to the business.

No experience necessary although some exposure to marine insurance would be helpful.

Programme

- Sources of law
- National vs. international
- Conventions
 - How they are created
 - How they are enforced
- Liens
- Limitation of liability
- Arrest
- Salvage
- Collisions
- Passengers
- Towage
- General Average
- Wreck removal
- Pollution
- Contracts of carriage
- Charterparties
- Bills of lading
- Other documents
- Hague-Visby and Hamburg rules
- Multimodal transport.

aviation, marine and energy courses

Aviation, marine and energy courses

Hull and yacht insurance (introductory)

Half day course (morning)

Dates
23 Feb/26 Oct
Venue
London
Cost
£130 members/£150 non-members

Marine liability (introductory)

Half day course (afternoon)

Dates
23 Feb/26 Oct
Venue
London
Cost
£130 members/£150 non-members

Cargo insurance (introductory)

Half day course (morning)

Dates
24 Feb/27 Oct
Venue
London
Cost
£130 members/£150 non-members

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Benefits

At the end of the course you will have:

- Gained an understanding of both hull and yacht risks and the significant differences between them
- Gained maximum benefit from experienced market speakers
- Obtained extensive introductory knowledge of hull and yacht insurance and the related terminology.

Course

This course is designed to introduce delegates who are new to the basics of marine hull and yacht insurance.

Who should attend?

Anyone who is new to hull insurance.

No experience necessary although some general knowledge of marine insurance would be helpful.

Programme

- The types of craft that can be insured under a hull policy
- Differences between shipowners and charterers
- The main differences between hull risks and yacht risks
- What are the key points that underwriters will be considering in relation to each type of risk?
- Where are the main yacht and hull insurers, and are they the same?
- Review of the main London market hull and yacht clauses and comparison with the main international clauses (German, Norwegian, American)
- Link between hull and liability coverages (Protection and Indemnity insurance)
- Overview of the legal regimes that impact on the shipping business
- Builders' risks insurance
- Types of claim that commonly arise
- Loss prevention.

Benefits

At the end of the course you will have:

- Gained an understanding of the various types of marine liability risks and the available insurances
- Gained an understanding of the various markets available
- Gained maximum benefit from experienced market speakers
- Obtained an extensive introductory knowledge of the marine liability area.

Course

This course is designed to introduce delegates who are new to the concept of marine liability risks and associated insurances.

Who should attend?

No experience necessary although some general knowledge of marine insurance would be helpful.

Anyone who is new to marine insurance.

Programme

- What sort of liability risks are there?
- Which parties might be interested in this type of insurance?
- How does it interface with other types of marine insurance such as hull and cargo?
- Who are the insurers?
- What are the underwriting considerations?
- What coverage is available in the various areas?
- Introduction to the legal regime which can impact on liability
- Introduction to the various basic clauses
- What types of claims arise?
- Loss prevention.

Benefits

At the end of the course you will have:

- Gained an understanding of the basics of each type of business which can be underwritten into a cargo book of business and the types of risks written
- Gained maximum benefit from expert market speakers
- Obtained extensive introductory knowledge about cargo insurance and related terminology.

Course

This course is designed to introduce delegates who are new to the basics of cargo and associated classes of business.

Who should attend?

Anyone who is new to cargo insurance.

No experience necessary although some general knowledge of marine insurance would be helpful.

Programme

- What types of risks can be written in a standard cargo account?
- Overview of Jewellers Block, Fine Art, and General Specie, and Pre-Launch insurance
- What business is general cargo insurance protecting?
- How are goods carried?
- Introduction to legal and documentary elements of carriage of goods by sea, road, rail and air
- Overview of the main institute clauses and introduction to the specialist clauses and key international clauses
- What are the underwriting considerations for cargo insurance?
- Types of policy available
- Loss prevention and mitigation
- Recoveries.

aviation, marine and energy courses

Aviation, marine and energy courses

Specie insurance (introductory)

Half day course (afternoon)

Dates

24 Feb/27 Oct

Venue

London

Cost

£130 members/£150 non-members

Energy insurance (introductory)

Half day course (morning)

Dates

25 Feb/28 Oct

Venue

London

Cost

£130 members/£150 non-members

'Interesting and helpful, complementing my existing knowledge...course materials were very comprehensive.'

Pema, Non Marine Broker, October 10

Aviation insurance (introductory)

One day course

Dates

07 Jun/28 Oct

Venue

London

Cost

£205 members/£235 non-members

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Benefits

At the end of the course you will have:

- Gained an understanding of the basics of each type of business which can be underwritten into a specie book of business and the types of risks written
- Gained maximum benefit from expert market speakers
- Obtained extensive introductory knowledge about specie insurance and related terminology.

Course

This course is designed to introduce delegates who are new to the basics of specie and associated classes of business.

Who should attend?

Anyone who is new to specie insurance. No experience necessary although some general knowledge of insurance would be helpful.

Programme

- What types of risks can be written in a standard specie account?
- Introduction to and history of Jewellers Block, Fine Art, and General Specie business
- What risks are being covered in relation to each of these classes?
- Introduction to the main clauses used in the London market for these classes
- What are the underwriting considerations for specie insurance?
- Loss prevention and mitigation
- Recoveries.

Benefits

At the end of the course you will have:

- Gained an understanding of the basics of both onshore and offshore energy insurance and the underlying risks
- Gained maximum benefit from experienced market speakers
- Obtained thorough introductory knowledge about energy risks and the related terminology.

Course

This course is designed to introduce delegates who are new to the basics of energy insurances of all types.

Who should attend?

Anyone who is new to energy insurance. No experience necessary although some general knowledge of marine insurance would be helpful.

Programme

- History and overview of the energy business
- Development of the energy insurance market
- Introduction to terminology
- Where are the insurers and how has the market changed over the last few years?
- What risks are being covered?
- Links with the non marine market
- What are the underwriting issues?
- Introduction to the main clauses being used
- Loss prevention.

Benefits

At the end of the course you will have:

- Gained an understanding of the main conventions and protocols
- Gained an understanding of how hull and liability risks are insured.

Course

This course gives an understanding of the main principles and practice of aviation, hull and liability insurance. The programme explains the development of aviation insurance, aviation insurance law and the types of cover available.

Who should attend?

Highly recommended for newcomers to aviation offices, Lloyd's syndicates and the aviation insurance departments of insurance companies, brokers and airlines.

Programme

- The development of aviation insurance
- The aviation insurance market
- Aviation insurance law
- Hull insurance
- Passenger liabilities
- Products' liabilities.

aviation, marine and energy courses

Aviation, marine and energy courses

Intensive marine insurance (introductory)

Five day course

Dates
20–24 Jun
Venue
London
Cost
£1,575 members/£1,720 non-members

Yacht insurance (intermediate)

Four day course

Dates
05–08 Jul
Venue
London
Cost
£1,290 members/£1,415 non-members

Marine liability (intermediate)

Four day course

Dates
08–11 Jun
Venue
London
Cost
£1,290 members/£1,415 non-members

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Benefits

At the end of the course you will have:

- Gained an understanding of the key theories of marine insurance and their application
- Gained maximum benefit from market expert speakers
- Obtained extensive introductory knowledge in this area.

Course

Gain a broad knowledge of key market considerations of marine insurance through study of theory in the context of the commercial market.

Who should attend?

New entrants to the marine insurance market or anyone who needs to gain an understanding of the processes involved in marine insurance.

Programme

- The function of marine insurance, why insure, types of ships
- The Lloyd's market and alternative insurance markets in the UK and internationally
- Legal principles, the contract, insurable interest, utmost good faith, disclosure and warranties
- Cargo insurance, affecting cover
- A brief review of the institute clauses and market associations
- The function of P&I Clubs
- Shipowners' liability to third parties
- Principles of reinsurance applied to marine
- The work of the Salvage Association – an analysis of its work in both the UK and internationally
- Claims.

Follow-on courses

- Marine cargo (intermediate), see overleaf
- Marine hull (intermediate), see overleaf

Benefits

At the end of the course you will have:

- Developed your understanding of yacht risks
- Gained maximum benefit from experienced market speakers
- Undertaken a site visit to a vessel
- Developed your knowledge of yacht insurance and the related terminology.

Course

This course is designed to develop delegates' existing knowledge of yacht insurance.

Who should attend?

Anyone working within this area or who has interest in it. It is expected that you will have a basic knowledge of yacht insurance.

Programme

- What types of craft can be insured under a yacht policy?
- Issues around construction of hulls and machinery
- What are the main risks faced by yachts and recreational vessels?
- Roles of specialists within the yacht market
- Legal issue affecting yacht insurance
- Underwriting issues affecting yacht cover
- Claims issues affecting yacht cover
- Common clauses and forms
- CLASS and Flag in relation to yachts.

Benefits

At the end of the course you will have:

- Developed your understanding of marine liability risks and the available insurances
- Developed your knowledge of the various markets available
- Gained maximum benefit from expert market speakers
- Developed your knowledge about marine liability and related terminology.

Course

This course is designed to build knowledge on to the introductory course and develop and explore the current issues around marine liability insurance.

Who should attend?

Those working within this area or who have an interest in this subject. You will be expected to have a basic understanding of marine liability insurance.

Programme

- What types of risks can be written?
- What types of insurance are involved and what are the primary markets?
- Protection and Indemnity insurance
- Other insurance provided by the mutual market
- Non-mutual liability cover, particularly US P&I forms
- Underwriting issues
- Claims handling issues.

aviation, marine and energy courses

Aviation, marine and energy courses

Marine cargo (intermediate)



Five day course

Dates
11–15 May/20–24 Jun/14–18 Nov
Venue
London
Cost
£1,615 members/£1,765 non-members

Marine hull (intermediate)



Five day course

Dates
27 Jun–01 Jul/21–25 Nov
Venue
London
Cost
£1,615 members/£1,765 non-members

Oil workshop (intermediate)

Three day course

Dates
01–03 Jun
Venue
London
Cost
£1,045 members/£1,185 non-members

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Benefits

- A practical and detailed approach
- Interactive exercises
- Extend knowledge of cargo shipment
- Understand practical market considerations.

Course

This course explains the main methods of cargo shipment and the documents used in international trade. It also examines the main areas of loss prevention and key considerations of cargo underwriting.

Delegates participate actively in the course with the opportunity for discussions with key marine market speakers.

Who should attend?

Staff of brokers, insurance companies, Lloyd's syndicates and shipping companies.

Programme

- The law
- Cargo underwriting
- Clauses
- Cargo loss prevention – a cargo surveyor's view
- Containers – the problems associated with insuring containers
- Cargo claims
- Practical exercises.

Follow-on course

- Marine hull (intermediate), see below.

Benefits

- Detailed technical understanding of marine hull insurance
- Key market speakers
- Practical approach.

Course

The major aspects of marine hull insurance are covered including shipowners' liabilities, exclusions and limitations; an in-depth consideration of the clauses applying to hull insurance, a practical consideration of underwriting and broking problems and hull claims.

Who should attend?

Staff of brokers, companies, Lloyd's syndicates and shipping companies. Delegates are expected to have a working knowledge of the basic fundamentals of marine insurance or to have attended our Marine insurance (introductory) course.

Programme

- The marine insurance market
- Marine law
 - Marine Insurance Act 1906
 - The law on latent defect Maritime Conventions Act 1911
 - Collision liabilities
 - The Merchant Shipping Act 1979
- Hull clauses
- Protection and indemnity
- Hull underwriting and broking
- Lloyd's Maritime Information Service
- Reinsurance
- A case study involving
 - the preparation of an average adjustment
 - the application of the claim to the policy.

Benefits

- Understand underwriting considerations
- Gain a good working knowledge of insurance requirements for oil installations and types of oil units
- Extend existing knowledge of oil insurance in a practical context
- Leading market expert speakers.

Course

Delegates gain a good working knowledge of the insurance requirements for oil installations from a broking and an underwriting perspective. The programme looks at the types of oil unit, the cover available, underwriting considerations, the work of the classification societies and reinsurance.

Who should attend?

Staff of brokers, insurance companies, Lloyd's syndicates and those involved in support services.

Programme

- The types of oil installation
- The London standard drilling barge form and London platform form
- Oil and energy underwriting and broking
- Construction risks, control of well
- Classification of oil units
- Warranty surveying
- Reinsurance of oil units.

Follow-on course

- Oil workshop (advanced), see overleaf.

aviation, marine and energy courses

Aviation, marine and energy courses

Oil workshop (advanced)

Two day course

Dates
28–29 Nov
Venue
London
Cost
£920 members/£1,055 non-members

Benefits

- Gain a fascinating insight into this specialist subject area
- Practical workshop
- An in-depth understanding of the key market issues affecting the oil insurance market today.

Course

A stimulating course that builds on knowledge gained in the oil workshop (intermediate) course. The programme is highly participative and provides a deeper understanding of the more complex areas of the business. The course speaker is a leading market practitioner.

Who should attend?

Staff of brokers, insurance companies, Lloyd's syndicates and those involved in support services who wish to develop their existing knowledge and experience of the oil insurance market.

Programme

- Overview of the current trends and developments in risk management/transfer options.

Workshops covering:

- Anatomy of the placement process
- Alternative markets
- Technical coverage issues
- Liabilities (occurrence versus claims-made wording issues)
- Specific focus
- Claims
- The control of wells, redrilling, pollution, physical damage, third party property and injury claims, and consequential losses.

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reinsurance courses

80 Captives and other methods of
alternative risk transfer

80 Non-marine reinsurance (introductory)

80 Non-marine reinsurance (intermediate)

80 Reinsurance (advanced)

For Introduction to reinsurance courses
please refer to page 52

reinsurance courses

Reinsurance courses

Captives and other methods of alternative risk transfer

One day course

Dates	16 Feb/14 Jun/16 Nov
Venue	London
Cost	£230 members/£270 non-members

Non-marine reinsurance (introductory)

Five day course

Dates	16–20 May/22–26 Aug
Venue	London
Cost	£1,370 members/£1,520 non-members

Non-marine reinsurance (intermediate)



Four day course

Dates	30 Aug–02 Sep
Venue	London
Cost	£1,500 members/£1,625 non-members

Reinsurance (advanced)

Five day course

Dates	22–26 Aug
Venue	London
Cost	£2,065 members/£2,250 non-members

'All five days were valuable and I feel more confident about my technical reinsurance knowledge. The interactive elements were a great aid to learning.'

Scott, Senior Technician, July 10

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Benefits

At the end of the course you will:

- Understand what a captive insurer is, who might use them and why
- Look at the issues around how to manage and where to have them
- Identify the different options for Alternative Methods of Risks Transfer
- Increase your technical knowledge of reinsurance and ART.

Course

This course is designed for those who want to understand the ways a business might deal with its exposure to a variety of events that could adversely affect its cash flow and balance sheet strength.

Who should attend?

Anyone who works in direct writing and reinsurance companies, brokers and organisations dealing with reinsurance and anyone who wishes to widen their technical knowledge of reinsurance options.

Programme

Detailed study of:

- Art, finite risk, convergence, non-traditional insurance and reinsurance
- What are the products and how do they work?
- Are they 'insurance'?
- Prospective and retrospective rating
- Combined trigger covers
- Tradeable weather derivative
- Securitisation (bonds).

Benefits

At the end of the course you will:

- Have gained an intensive insight into non-marine reinsurance
- Be able to explain the differences between reinsurance arrangements commonly used
- Be aware of the best methods to adopt
- Know the implications and gain a practical understanding of the market.

Course

This intensive course gives delegates a thorough foundation knowledge of reinsurance and explains in detail the different types of reinsurance, and the key principles of programme design. This course can be followed by the Intermediate non-marine reinsurance course which will extend delegates' technical knowledge in this area of business.

Who should attend?

Anyone who works in direct insurance or reinsurance who needs a clear understanding of reinsurance.
Anyone looking to progress into this area.

Programme

A detailed explanation and practical understanding of:

- Facultative reinsurance
- Treaty reinsurance
- Proportional reinsurance
- Non-proportional reinsurance
- Reinsurance programming.

The course involves interactive and practical sessions with market professionals.

Follow-on course

- Non-marine reinsurance (intermediate), see below.

Benefits

- Discuss current reinsurance methods and practices
- A practical approach to building up technical knowledge of this area
- Detailed study of the major types of reinsurance with a leading market practitioner.

Course

The course covers the key elements of reinsurance methods and practices including the application of facultative and treaty business and the considerations made when transacting reinsurance and underwriting proportional and non-proportional treaties.

Who should attend?

Anyone who wishes to widen their technical knowledge of reinsurance.

Programme

Detailed study of:

- Proportional reinsurance
- Non-proportional reinsurance
- Liability
- Practical workshops (property and liability).

Pulling it all together in an interactive session on designing a reinsurance programme.

Follow-on course

- Reinsurance (advanced), see below.

Benefits

- Gain in-depth technical knowledge from the leading market professionals
- Take advantage of networking opportunities.

Course

A highly interactive and intensive course that gives in-depth coverage of property and liability reinsurance programme design, pricing and the key issues associated with this business in today's world insurance markets. Alternative risk transfer and the future of reinsurance are key sessions.

Who should attend?

Delegates who work in direct writing and reinsurance companies, brokers and organisations dealing with reinsurance. Delegates from outside the UK must have significant knowledge and command of English to be able to absorb, discuss and participate during the course sessions and the syndicate exercises.

Programme

- Fundamental reinsurance purchasing decisions
- Property and liability programme design and pricing
- The impact of key reinsurance clauses
- Reinsurance claims
- Alternative possibilities for reinsurance:
 - what are they?
 - are they effective?
 - are they acceptable to regulators? e.g. Hedge Funds, Catastrophe Bonds, Contingent Capital Finite Risk, the power of modelling over pricing and reinsurance buying
 - what is the likely direction of reinsurance in the future?

Liability insurance is of pivotal importance for all sectors of the insurance market. It is a complex class of business that calls for a high degree of technical skill and awareness. Effective training is vital in helping brokers, underwriters and claims staff develop their understanding of how to provide suitable advice, products and service.

liability and motor courses

-
- 84 Liability insurance (introductory)
 - 84 Liability insurance (advanced)
 - 84 Liability insurance claims
 - 86 Motor claims (introductory)
 - 86 Motor insurance policies (introductory)
 - 86 Motor insurance (intermediate)
 - 88 Intermediate professional indemnity
 - 88 Intermediate directors' and officers' liability

liability and motor courses

Liability and motor courses

Liability insurance (introductory)



'Really enjoyed this course and feel I am leaving with enhanced knowledge of the subject.'

Rachel, Clinical Trials Broker, May 10

Two day course

Dates

05–06 May/17–18 Nov

Venue

London

Cost

£360 members/£410 non-members

Liability insurance (advanced)

Two day course

Dates

01–02 Nov

Venue

London

Cost

£410 members/£475 non-members

Liability insurance claims

Three day course

Dates

23–25 Nov

Venue

London

Cost

£565 members/£650 non-members

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Benefits

At the end of the course you will have:

- Gained a valuable overview of the legal requirements of this type of business
- Gained an understanding of the additional requirements for the EU
- Gained an understanding of the key underwriting and rating considerations.

Course

An excellent introduction to liability insurance that will enable delegates to understand how and why this type of business developed as well as gaining an understanding of the main types of liability insurance cover available.

Who should attend?

Those who wish to extend their knowledge of insurance or to specialise in this class of business.

Programme

- General principles of liability insurance
- Legal background to the liability business
- Principles governing the award of damages
- Employers' liability insurance
- Public (general) and product liability insurance
- Professional liabilities and specialised covers including directors' and officers', libel insurance and legal expenses.

Follow-on courses

- Liability insurance (advanced), see below
- Liability insurance claims, see below.

Benefits

At the end of the course you will have:

- Developed an in-depth understanding of the issues surrounding the underwriting and claims of liability risks
- Gained an awareness of recent important cases
- Gained up-to-date knowledge of new and pending legislation.

Course

An intensive and highly interactive course designed to provide an in-depth knowledge of this class of business.

Using a mixture of lectures and practical exercises, delegates develop solutions to some of the more complex issues that arise today in the liability insurance market and then discuss the effects of the solutions they propose.

Who should attend?

Those with significant underwriting experience who wish to develop and update their understanding of market issues and their knowledge of liability underwriting and claims.

Programme

- Recent legal developments affecting liability insurance generally
- Recent legal developments affecting assessment of damages awarded and claims estimating
- Developments in liability insurance policy covers
- Pollution and environmental liabilities
- Developments in underwriting and rating
- Current problem areas for insurers, brokers and their clients
- International developments.

Note: The nature of the course means that the content is likely to vary.

Benefits

During this course, you will:

- Assess new and pending legislation
- Discuss recent key developments
- Gain knowledge of claims assessment
- Gain an understanding of the implications of investigations on claims settlements.

Course

An intensive course designed to provide delegates with a good understanding of the different issues surrounding the assessment and settlement of non-motor liability claims. The programme shows how claims can arise and considers how insurers handle them.

Who should attend?

Those who have knowledge of liability insurance and who are currently working or are about to enter the complex field of handling liability insurance claims.

Programme

- How liability arises in tort and in contract
- Principles governing the assessment of damages and claims estimating
- Current legal issues
- Claims handling under the various classes of liability insurance
 - professional indemnity
 - employers' liabilities
 - public liability
 - pollution and environmental liability
 - manufacturers' and producers' liability
- Claims handling including investigation, negotiation, claims disputes, litigation and the alternatives
- Case studies.

Follow-on courses

- Liability insurance (advanced), see above
- Claims management, see page 96.

liability and motor courses

Liability and motor courses

Motor claims (introductory)

One day course

Dates

09 Feb/26 Apr/08 Nov

Venue

London

Cost

£205 members/£235 non-members

Motor insurance policies (introductory)

One day course

Dates

10 Feb/27 Apr/09 Nov

Venue

London

Cost

£205 members/£235 non-members

Motor insurance (intermediate)

One day course

Dates

11 Feb/28 Apr/10 Nov

Venue

London

Cost

£230 members/£270 non-members

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Benefits

At the end of the course you will have:

- Obtained a broad understanding of motor policy wordings
- Gained an understanding of how the most common types of motor claims are considered
- Understood how insurance principles may affect consideration of motor claims.

Course

This course provides a valuable overview of the most common type of claims that arise on motor policies, focusing on the private car policy, using the framework of insurance principles to highlight the methodology that may be adopted to minimise cost.

Who should attend?

This is ideal for anyone who is new to motor claims handling in the insurance industry or has less than two years' experience in this area.

Programme

- Principles of insurance
- Theft claims
- Fire claims
- Accidental damage claims
- Third party claims, including minor third party injury claims
- Relevant statutes and regulations.

Benefits

At the end of the course you will have:

- Gained a knowledge of the different types of motor policy available
- Obtained an understanding of the insurance principles which guide the creation of conditions, exclusions, etc, found within most types of motor policy
- Understood the fundamental differences between personal and commercial motor policies.

Course

This course explains the basic structure of motor policies, looking principally at the private motor policy, but also highlighting the difference with other types of policy, including commercial motor, fleet, motorcycle, and non-standard wordings.

Who should attend?

Those who are new to motor insurance or who have up to two years' experience and require a more thorough understanding of a motor policy structure.

Programme

- Principles of insurance
- Private motor policies: structure and basis
- Commercial policies outline, including commercial motor, fleet motor trade, motor cycle, etc
- Recent revisions following the introduction of the latest legislative changes.

Benefits

At the end of the course you will:

- Gain an understanding of the principal statutes and regulations that affect motor claims handling, including relevant EU Directives
- Understand the pertinent case law
- Recognise the effect of statutes, case law, etc, on insurance principles, and the approach to claims handling
- Be aware of the more common motor liability situations, and the current case law which may assist in determining liability.

Course

The course is aimed at those motor claims' handlers who have say two to five years' claims handling experience, and wish to enhance their legal knowledge.

Who should attend?

Those who are new to motor insurance or who have up to two years' experience and require a more thorough understanding of the legal issues affecting motor insurance.

Programme

- Road Traffic Act 1988, EU directives and associated regulations
- Corporate Manslaughter Act 2007 and Road Safety Act 2006
- Insurance principles
- RTA insurer, Article 75 insurer and Motor Insurance Bureau claims
- Avoidance, declinature of indemnity
- Law Reform (Contributory Negligence) Act 1945
- Accidents at cross roads, T junctions, negligently parked vehicles, overtaking and queue jumping.

liability and motor courses

Liability and motor courses

Intermediate professional indemnity

One day course

Dates

26 Apr/08 Nov

Venue

London

Cost

£230 members/£270 non-members

'Very useful, clarified a lot of questions and areas I was unsure of.'

Simon, Liability Underwriter, March 10

Intermediate directors' & officers' liability

One day course

Dates

27 Apr/10 Nov

Venue

London

Cost

£230 members/£270 non-members

For bookings, enquiries and updates visit www.cii.co.uk/f2f or call Customer Service on +44 (0)20 8989 8464.

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Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Benefits

On completion of the course delegates will be able to:

- Describe how recent case law and legislation has impacted the liability of professionals
- Identify the hazards associated with various major professionals including, but not limited to, accountants, solicitors, construction professionals, information technology and media
- Describe the coverage provided by professional indemnity policies including specific professional indemnity policy extensions
- Explain the major differences between the professional indemnity coverage offered to different professionals
- Explain the principle underwriting considerations which impact various professionals
- Describe how professionals can effectively manage their risk
- Identify the correct strategy for the handling of professional indemnity claims.

Course

The course is aimed at delegates who already have an understanding of professional indemnity insurance. It will be highly interactive and delegates will be given a series of exercises and case studies to reinforce their learning.

Who should attend?

Those who wish to extend their knowledge of insurance or to specialise in this class of business.

Programme

- Professional indemnity case law recent developments
- Practising requirements
- Accountants, solicitors, surveyors, architects, design and build, media, information technology and miscellaneous
- Policy coverage
- Underwriting considerations
- Risk management
- Claims management.

Benefits

On completion of the course delegates will be able to:

- Describe the duties of directors and officers
- Compare and contrast the potential personal liability of directors and officers in both UK and USA
- Describe how recent legal developments may impact future claims exposure
- Outline how directors' duties and liabilities may differ in other jurisdictions
- Describe the principal benefits of a directors' & officers' liability policy
- Explain the principal extensions and exclusions which are usually included in a directors' & officers' policy
- Outline how directors' & officers' coverage dovetails with other liability coverage
- Identify the principal underwriting considerations which apply
- Identify the key features of directors' & officers' liability claims handling.

Course

The course is aimed at delegates who already have an understanding of directors' & officers' liability insurance. It will be highly interactive as delegates will be given a series of exercises and case studies to reinforce their learning.

Who should attend?

Those who wish to extend their knowledge of insurance or to specialise in this class of business.

Programme

- Directors' & officers' liabilities
- Recent claim examples
- Recent changes in case law, company law and other legislation
- Policy coverage
- Underwriting considerations
- Claims management.

Everything in business involves risk. The importance of managing risk within organisations has increased in recent years, with the responsibility often falling to senior managers. It is not just companies with complex or hazardous profiles that need to be aware of risk management issues; every organisation needs a capability in this area to deal with issues such as economic risk, the loss of IT capacity, skills retention, health and safety, or standard perils. The CII is the ideal place to learn about risk and how best it can be managed. Remember, prevention is better than cure. That is why risk management is essential for every organisation.

risk management, underwriting and property courses

-
- 92 Risk management (introductory)
 - 92 Enterprise risk management (intermediate)
 - 92 Property risk assessment and surveying (introductory)
 - 94 Property insurance (introductory)
 - 94 Fire and business interruption (intermediate)
 - 94 Business interruption (advanced)
 - 96 Claims management
 - 96 Managing an underwriting portfolio
 - 96 Statistics for underwriters and managers
 - 98 Finance for insurance professionals

risk management, underwriting and property courses

Risk management, underwriting and property courses

Risk management (introductory)



'Tutor guided me through the technical
detail to boost my understanding.'

Alison, Team Leader, November 10

Two day course

Dates	24–25 May/02–03 Nov
Venue	London
Cost	£360 members/£410 non-members

Enterprise risk management (intermediate)

One day course

Dates	17 Feb/15 Jun/17 Nov
Venue	London
Cost	£230 members/£270 non-members

Property risk assessment and surveying (introductory)

Three day course

Dates	15–17 Nov
Venue	London
Cost	£515 members/£595 non-members

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www.cii.co.uk/f2f or call Customer Service
on +44 (0)20 8989 8464.

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on +44 (0)20 7283 3117
or email face-to-facetraining@cii.co.uk

Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Benefits

At the end of the course you will have:

- Gained an insight into risk management
- Obtained knowledge from an experienced risk manager
- Gained an understanding of the growing challenges facing the risk manager.

Course

This intensive course gives a comprehensive introduction to the world of risk management. The course outlines the important issues surrounding risk management and seeks to improve knowledge and understanding of the many factors that might increase an organisation's exposure to risk.

Who should attend?

Anyone working within, or has a wish to gain specialist knowledge of, risk management.

Programme

- What is risk management?
- What is the need for a risk manager in the present day business environment?
- What is the role of a risk manager?
- What do others expect of the risk manager?
 - Health and Safety issues
 - detecting risk
 - risk analysis techniques
 - obtaining data
 - statistical analysis

- risk mapping
- maximum or probable loss analysis
- hazard and operability studies
- Dow Chemical Fire and Explosion Index
- Reduction and elimination of risk
- Risk retention – incentives for this strategy
- Risk financing – threats and opportunities
- Business continuity strategies
- The future of the discipline of risk management
- Growing challenges facing the risk manager.

Benefits

- Gain an understanding of the main risks affecting an enterprise
- Analyse real life case studies
- Increase your confidence in applying risk management techniques
- Discuss current ERM issues
- Take advantage of networking opportunities.

Course

This course is designed as an interactive way to look at current risk issues for enterprises and to identify the options available to manage specific risks.

Who should attend?

This course will benefit anyone in an organisation who manages risk or is involved in the risk management process.

Programme

- Definition of risk
- Risk assessment and analysis
- Risk options and control
- Risk financing.

Benefits

- An intensive theoretical and practical insight into the property surveyor's job and risk assessment in this area
- No previous knowledge and experience assumed.

Course

Insurers and brokers need operatives who can analyse and select risks to fit in with their own philosophy of risk. Many insurers who have failed to do this task efficiently have suffered accordingly. This course provides both a theoretical and practical insight into the assessment of risk and how a surveyor gathers the necessary information.

Who should attend?

Underwriting and surveying staff in companies and brokers who need to assess risks.

Programme

- The need for risk assessment in commercial property business
- The surveyor's job as a part of the underwriting function
- Building construction and how it affects risk
- Causes of fire and explosion
- What items are likely to be set on fire first?
- The fire hazards of specific trades
- Methods of risk assessment and practical examples

- Fire protection including sprinklers and practical demonstrations of fire fighting equipment
- EML calculations
- Understanding survey reports
- A visit to a risk site with an assessment.

Follow-on course

- Risk management (introductory), see above.

risk management, underwriting and property courses

Risk management, underwriting and property courses

Property insurance (introductory)

Five day course

Dates
17–21 Oct
Venue
London
Cost
£1,790 members/£1,930 non-members (all modules)
£720 members/£770 non-members (module 1 or 2)
£360 members/£390 non-members (module 3)

'I thought the interaction on this course was beneficial. I have learnt more than when I have attended 'lecture' style courses.'

Stephanie, Client Advisor, October 10

Fire and business interruption (intermediate)

Four day course

Dates
07–10 Nov
Venue
London
Cost
£1,170 members/£1,300 non-members (all four days)
£590 members/£650 non-members (per module)

Business interruption (advanced)

Two day course

Dates
24–25 Nov
Venue
London
Cost
£410 members/£475 non-members

'Excellent course and coverage of the subject...the tutor injected fun to the two days.'

Andrew, Technical Claims Advisor, March 10

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Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Benefits

- Gain foundation knowledge of all the main property insurance classes
- Select separate modules.

Course

An excellent comprehensive introduction to the main classes of property insurance. Different elements of the programme – fire insurance, business interruption or other property classes – can be selected as required.

Who should attend?

Anyone who needs an introduction to the main classes of property insurance.

Programme

Module 1 – Fire insurance (2 days)

- The principles of
 - utmost good faith
 - insurable interest
 - indemnity
 - proximate cause
 - subrogation and contribution
- Modern wordings of the fire policy
- Rating basis for combinations of cover and perils
- Assess EML/PML factors and retention levels
- Risk sharing agreements
- Special policy wordings and extensions to cover
- Case studies.

Module 2 – Business interruption insurance (2 days)

- The standard profits policy wording
- Basic accounts
- Methods of arriving at the sum assured
- Indemnity period: demonstration loss settlement
- Rating
- Examination of special covers in current use.

Module 3 – Other property classes (1 day)

- Theft insurance
 - policy wordings
 - underwriting principles and practice
- Money insurance
- Goods-in-transit
- Glass insurance
- Deterioration of stock insurance.

Follow-on course

- Fire and business interruption (intermediate), see below.

Benefits

- Upgrade technical knowledge in this area
- Receive practical tuition in these complex areas
- Gain an in-depth understanding of the underwriting characteristics of fire and business interruption, special peril risks and wordings
- Extend your underwriting skills.

Course

Insurers and brokers need operatives who can analyse and select risks to fit in with their own philosophy of risk. Many insurers who have failed to do this task efficiently have suffered accordingly.

This course provides both a theoretical and practical insight into the assessment of risk and how a surveyor gathers the necessary information.

Who should attend?

Underwriting and surveying staff in companies and brokers who need to assess risks.

Programme

Module 1 – Intermediate fire (2 days)

- Property insurance and risk assessment
- Control techniques
- Rating basis for combinations of cover and perils
- Assess EML/PML factors and retention levels
- Risk sharing agreements
- Special policy wordings and extensions to cover
- Case studies.

Module 2 – Intermediate business interruption (2 days)

- Interruption insurance: risk assessment and control
- Rating basis
- Assess EML/PML factors and retention levels
- Special policy wordings and extensions to cover
- Case studies.

Follow-on course

- Business interruption (advanced), see below.

Benefits

- Develop your underwriting and risk assessment techniques
- Gain up-to-date understanding of market issues
- Develop your knowledge of commercial business interruption underwriting
- Explore alternative solutions to complex risks.

Course

This programme extends the experience of business interruption professionals to an advanced level using case studies and interactive training sessions.

Who should attend?

Delegates who have a working knowledge of business interruption underwriting.

Programme

- An overview of the development of business interruption
 - wordings
 - ratings
- Key aspects of policy cover and particular areas of difficulty
 - advanced profits
 - research and development
 - non-economic limits
- Special classes and risks
- Case studies and exercises.

risk management, underwriting and property courses

Risk management, underwriting and property courses

Claims management

Two day course

Dates
21–22 Feb/03–04 Nov
Venue
London
Cost
£410 members/£470 non-members

'Good interactive training course.'
Kristy, Project Management Support, June 10

Managing an underwriting portfolio

Two day course

Dates
09–10 Jun/17–18 Nov
Venue
London
Cost
£1,090 members/£1,250 non-members

run in association with



Training for Insurance Professionals

Statistics for underwriters and managers

Two day course

Dates
12–13 May/15–16 Oct
Venue
London
Cost
£1,090 members/£1,250 non-members

run in association with



Training for Insurance Professionals

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Benefits

- Gain an understanding of the effective management of claims
- Share experiences with other claims representatives
- Obtain knowledge on current problems facing claims personnel.

Course

Designed to develop a practical working knowledge of the handling and management of claims, this course covers commercial and personal lines.

Who should attend?

Anybody who has ambitions to be a mentor, supervisor or manager in the claims environment or anybody who has recently arrived in any of these positions or has to handle claims as part of their job.

This course will be of benefit to people who are working in an insurance company, an intermediary's office or who are managing their own claims from a non insurance environment.

Programme

- Role of the claims department
- Corporate claims philosophy
- Quality management
- Procedures in a claims department
- The need and practice of claims reserving
- Methods of dispute resolution and litigation.

Benefits

- Develop the financial and statistical skills necessary for the management of an insurance portfolio
- Understand the product life cycle as applied to insurance
- Identify non-performing segments within a portfolio
- Build strategies to refocus an ailing insurance portfolio
- Develop a view of a portfolio as a whole, rather than a case-specific perspective
- Receive a CD ROM containing notes and fully working tools.

Course

This course recognises the fundamental difference between the skills required to manage a portfolio of insurance risks and those required to underwrite individual policies.

Techniques to monitor both price changes and absolute price levels are explored, as are ways of developing strategies to refocus an ailing portfolio. Systems to monitor changes are also explored. Case studies are used extensively throughout.

Who should attend?

Anyone with responsibility for an underwriting portfolio, or who is being developed for such a position.

Programme

- Skill requirements for portfolio management
- Measuring portfolio performance
- Price monitoring
- Segmenting an insurance portfolio
- Refocusing an ailing portfolio.

Benefits

- Gain a practical understanding of statistics as they are applied in insurance
- Acquire a deeper insight into insurance by gaining new perspectives on old issues
- Understand deductible-rating, reinsurance pricing and experience credits
- Increase confidence in communications with specialist actuaries and statisticians
- Develop scientific decision-making skills
- Acquire the ability to collate evidence to support underwriting and portfolio decisions
- Obtain many of the skills required to manage an insurance portfolio
- Receive a CD ROM containing notes and fully working tools.

Course

This course focuses on the practical use of statistics to aid everyday insurance decisions such as policy and deductible pricing, experience credits and general rate-making. This is not a course for those seeking a theoretical education in statistics, as heavy theory is avoided and the emphasis, instead, is on realistic insurance case studies.

Who should attend?

Anyone wishing to extend their knowledge of statistics.

Programme

- Introduction to probability and statistics
- Claims frequency and severity distributions
- Drawing inferences from insurance data.

risk management, underwriting and property courses

Risk management, underwriting and property courses

Finance for insurance professionals

Two day course

Date	23–24 June
Venue	London
Cost	£985 members/£1,150 non-members

Benefits

- Gain an understanding of the financial dynamics of insurance
- Recognise the different perspectives of accountants, actuaries and underwriters
- Understand the links between loss ratio, return-on-equity and other insurance measures
- Learn the basic principles and techniques of actuarial loss reserving
- Increase confidence in communications with specialist actuaries and accountants
- Understand financial statements and the fundamental principles behind them
- Learn fourteen key ratios that financial analysts use to 'read' a company's balance sheet
- Incorporate your client's financial status in your underwriting decision-making
- Receive a CD ROM documentation containing notes, exercises and fully-working tools.

Course

This course has two overriding aims: to improve understanding of the financial dynamics of insurance and to enable learners to 'read' the accounts of any company using fourteen key financial ratios. Two distinct modules cover these two aims, and both are prefaced by an 'Introduction to Accounts' module which ensures that learning is built on solid foundations.

Throughout the course there is an emphasis on the practical application of new-found knowledge, and exercises and group-work are used extensively to reinforce learning.

Who should attend?

Anyone, with little or no formal training in finance who wishes to improve their understanding of the financial dynamics of insurance (and of business, in general), will benefit from this course. Previous delegates have included underwriting, claims, marketing, risk management and HR professionals, and the course is particularly useful for property and casualty commercial lines underwriters and support staff.

Programme

- Introduction to accounts
 - nature and purpose of accounts
 - the main financial statements: balance sheet and profit and loss account
 - principles of accounting, and the implications for interpreting accounts
- Finance of insurance
 - the unique nature of insurance and specific balance sheet provisions
 - actuarial methods for loss reserving
 - financial year, accident year and underwriting year perspectives on data
 - insurance performance measures including loss ratios, operating profit and ROE
- Interpreting company accounts
 - profitability, efficiency, liquidity and solvency ratios
 - how analysts interpret ratios
 - characteristics of different industry groupings.

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London market courses

100 Commercial insurance contract wording

100 Binders – conducting effective audits

For Award in London Market courses please refer to page 28

London market courses

London market courses

Commercial insurance contract wording



One day course

Dates

22 Feb/24 May/01 Sep

Venue

London

Cost

£230 members/£270 non-members

Binders – conducting effective audits

One day course

Dates

22 Feb/20 Sep

Venue

London

Cost

£300 members/ £370 non-members

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Benefits

- Provides an overview of the regulatory regime to achieve contract certainty
- Gain an understanding of the legal interpretation of various elements in insurance and reinsurance contracts
- Build awareness of the scope of coverage and limits of insurance contract wordings
- Understand the implications of contract wordings as applied to different types of reinsurance.

Course

This course will provide an understanding of the importance of establishing legally sound insurance contract wordings. It will also cover a number of problems that may arise in the preparation of commercial policy wordings and slips and provide guidance in overcoming these. It will raise awareness of the importance of contract clarity.

The course is generic in nature and will apply to all classes of commercial insurance business and will be provided by presentation, discussion and exercises.

Who should attend?

The course will be appropriate to anyone involved in commercial insurance, in particular slip or policy drafting, broking or underwriting.

Programme

The London market – the regulatory regime and market initiatives

- FSA
- Market associations: Lloyd's Franchise Board, IUA, LMA and LMBC
- LMP Programme Office
- LMP slip.

The legal issues

- Legal relationships
- Law and jurisdiction
- Leading Underwriters' agreements
- Contracts of delegated underwriting.

Scope and cover of insurance wordings

- Use of proposal forms
- Model wordings
- Definition of key terms
- Types of delegated authority.

Main conditions applicable to commercial contract wordings

- Implied conditions
- Claims handling
- Disputes
- Cancellation.

Reinsurance and contract wordings

- Reinsurance wordings and slip policies
- Types of reinsurance and the different wordings required
- Key clauses for proportional and non-proportional reinsurances.

Benefits

- Understand the key elements necessary for effective audits
- See how categorisation provides clarity on audit data
- Learn how to evaluate audit data and apply it to decision making processes
- Be able to implement audit models tailored to specific needs
- Understand the fit of the FSA systems and controls and risk management requirements.

Who should attend?

This event will benefit anyone who oversees or operates under binding authorities. This will include third party audit service providers, insurer staff involved in delegated authorities as underwriters, claims handlers, audit reviewers and managers, as well as brokers who operate as coverholders.

Programme

- Audit scope: understand the full scope for effective audits, and how each element can be categorised for data clarity
- Audit data: how audit data can be evaluated and applied to decision making processes
- Reporting: developing a clear report structure that can help in the data review
- Regulatory considerations: reviewing the FSA Handbook elements that impact binder activity.

The compliance and regulatory courses available via Face-to-Face Training address the key issues facing companies and individuals in this key area. They focus on the many aspects of regulatory compliance and risk management, helping develop deep knowledge of the impact and purpose of regulation and the steps required to satisfy the regulator's demands and expectations.

compliance and regulatory courses

-
- | | |
|---|---|
| 104 Risk based monitoring | 108 FSA's Insurance Conduct of Business (ICOBS) rules |
| 104 Responsibilities of approved persons in significant influence functions | 110 Handling client money |
| 104 Structuring, managing and leading an effective compliance function | 110 Managing the risk of errors and omissions |
| 106 Preparing for ARROW visits | 112 Treating Customers Fairly |
| 106 Financial promotions | 112 Managing conflicts of interest |
| 106 Foundations of FSA regulation | 114 T&C supervisors' course |
| 108 Advising customers (COBS) | 114 Solvency II (one day) |
| 108 Being a compliance officer | 114 Solvency II (two day) |

compliance and regulatory courses

Compliance and regulatory courses

Risk based monitoring

Applying best practice principles

One day course

Dates
24 Feb/22 Sep
Venue
London
Cost
£330 members/£370 non-members

Responsibilities of approved persons in significant influence functions

One day course

Dates
01 Mar/04 Oct
Venue
London
Cost
£330 members/£370 non-members

Structuring, managing & leading an effective compliance function

One day course

Dates
04 Mar/07 Oct
Venue
London
Cost
£330 members/£370 non-members

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Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Benefits

- Know where to obtain data from inside and outside the firm so that risks can be identified and evaluated
- Use the FSA's risk assessment framework to inform your judgments
- Explore the use of key indicators and the relationships between risk/control and key indicators
- Examine the options for monitoring: desk based, exception reporting, systems and visits
- Construct a comprehensive compliance monitoring plan
- Tailor risk reporting to different groups to make sure critical messages are received and understood
- Make sure your monitoring regime is responsive to change.

Who should attend?

This one-day workshop has been designed to help those engaged in compliance, risk and audit functions, obtain and use the appropriate information to identify the principle compliance risks and design and plan a risk based compliance monitoring plan.

Programme

- Understanding the risk based monitoring approach
- Latest developments and techniques in risk based monitoring
- Identify the data within the firm that will inform your monitoring regime
- Preparing the monitoring plan: how to create a plan that will reflect risk priorities and drive out resource requirements
- Reporting results: structure a report format that communicates the priorities
- Remedial monitoring: respond to monitoring results and adjust the compliance plan.

Benefits

- Recognise what the FSA expects of you in terms of the way you carry out your responsibilities
- Review their allocation of Controlled Functions
- Examine the way in which systems and controls are allocated and overseen
- Apply the Principles for Approved Persons in a business situation
- Understand what the Principles are and what would constitute a breach of those principles
- Identify the process to keep documents supporting the governance of the company up to date (and often discovering they are not!).

Who should attend?

Approved Persons in Significant Influence functions:

- Executive and non executive directors
- Chief executives
- Finance directors and managers
- Compliance oversight
- Risk managers
- Operations managers.

Programme

- High Level Standards: review the High Level Standards and the importance the FSA attaches to them
- Controlled Functions: know and apply the Controlled Functions required in each firm by the FSA
- Approved Persons: the standards Approved Persons should meet and how they apply
- Maintaining approval: know what information must be notified to the FSA: fitness and propriety.

Benefits

- Get the most from your compliance resource and activities
- Build and maintain an effective monitoring programme
- Respond and contribute to changing business needs, risks and objectives
- Establish your compliance manual as a meaningful and valued resource
- Make sure your compliance reporting meets the expectations of senior management and the FSA.

Who should attend?

The programme will benefit individuals who are involved in the compliance arena in any sector as managers or directors and is equally informative for those in risk and audit departments who wish to gain an insight into how best to interface with this key function.

Programme

- Develop a common understanding of the purpose and context of the compliance function
- Organising the compliance function: design a compliance team structure to suit your business
- Building the compliance monitoring programme
- Reporting on compliance: identify the objectives and effective reporting methods
- Putting a compliance manual together: how to make it a worthwhile document
- Working with the business
- Respond to business changes: keeping the compliance function relevant and well regarded.

compliance and regulatory courses

Compliance and regulatory courses

Preparing for ARROW visits

One day course

Dates

23 Mar/19 Oct

Venue

London

Cost

£330 members/£370 non-members

Financial promotions

One day course

Dates

27 Apr/09 Nov

Venue

London

Cost

£330 members/£370 non-members

Foundations of FSA regulation

The root of the FSA approach

One day course

Dates

11 Feb/10 Jun/03 Nov

Venue

London

Cost

£330 members/£370 non-members

'Very useful as a refresher and to assist me in policy drafting.'

Judith, Policy Advisor, August 10

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Benefits

- Examine the FSA's risk categories and how they affect your assessment of risk
- Understand the focus on capital issues
- Understand how the pre-population of the risk assessment framework will drive supervisors' judgments of your firm
- Consider the key steps in preparing your firm
- Identify the likely 'hot spots' for your firm
- Understand the best way to manage a visit.

Who should attend?

Compliance Directors and Managers who are involved in preparing for and managing ARROW or FSA themed visits.

Programme

- The Firm Risk Assessment Framework: understand the FSA's preparatory work and its focus before the visit
- Identifying inherent risks: examine the environmental and business risks and identify those most likely to apply to your firm
- The FSA interview with senior managers: likely subjects and content
- Interview style and format: how to convey the information you need to give
- Practical guidance for managing the visit: establish a plan to manage the visit and to ensure key executives are properly briefed.

Benefits

- Examine the impact of PBR and TCF in conjunction with the rules
- Update and refresh your knowledge of ICOBS/MCOB and COB Financial Promotions rules
- Review the application of the rules on cold calling
- Recognise the key differences between promotions and other communications
- Check the effectiveness of your process for approvals
- Understand how the rules impact the internet and other electronic media
- Consider how you can evidence that your promotions present the offer fairly.

Who should attend?

If you are involved in creating and approving advertisements and other communications you will find this workshop adds to your knowledge and prompts a fresh look at your approach. Firms will gain real business benefits from sending people from their compliance and marketing areas.

Programme

- Principle-based regulation, and financial promotions
- COB chapter 4: Communications to clients, including financial promotions
- Compliance oversight
- ICOB chapter 3 and MCOB chapter 3
- Approving financial promotions
- Invitations, inducements, and some related problem areas
- Electronic media
- Financial promotions – common problems.

Benefits

- Understand the legal basis for the FSA's requirements
- Fully appreciate the role of the Principles for Businesses and their importance in the future
- Recognise the standards expected of Approved Persons running your business
- Understand the fit of the Principles with the operation of systems and controls
- Be fully up-to-date with the messages coming from recent enforcement actions
- Examine the developing role of compliance.

Who should attend?

Those new to a compliance role or needing to look at the big picture rather than detailed COB rules. Particularly useful for those in business areas impacted by compliance and needing to understand the context of the rules.

Programme

- Review of the high level standards
- Applying the principles for Approved Persons
- Risk, systems and controls
- The role of compliance
- The FSA's approach to discipline and enforcement.

compliance and regulatory courses

Compliance and regulatory courses

Advising customers (COBS)

Reviewing the COB rules that impact advice

One day course

Dates

25 Feb/28 May/16 Oct

Venue

London

Cost

£330 members/£370 non-members

Being a compliance officer



One day course

Dates

11 Feb/10 Jun/04 Nov

Venue

London

Cost

£330 members/£370 non-members

FSA's Insurance Conduct of Business (ICOBS) rules

One day course

Dates

11 Feb/10 Jun/03 Nov

Venue

London

Cost

£330 members/£370 non-members

For bookings, enquiries and updates visit www.cii.co.uk/f2f or call Customer Service on +44 (0)20 8989 8464.

To discuss technical, in-house and bespoke courses call Face-to-Face Training on +44 (0)20 7283 3117 or email face-to-facetraining@cii.co.uk

Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Benefits

- Understand the context, scope and application of the Conduct of Business rules
- Know the key rules applying to all firms advising on 'investments'
- Know how the rules apply to prospective and new customers
- Understand how rules should be applied when selling, or advising on, financial products
- Know what information must be provided to customers
- Know the rights of the customer immediately after purchase.

This course will include case studies and syndicate exercises to allow delegates to apply the rules to 'real' situations.

Who should attend?

Those requiring a refresher or foundation knowledge of the COB rules.

Programme

- COB 1: Application and general provisions
- COB 2: Rules applying to all firms
- COB 4: Accepting customers
- COB 5: Advising and selling
- COB 6: Product disclosure.

Benefits

At the end of the course you will have:

- Gained an understanding of how the role of a compliance officer relates to your firm
- A clear understanding of the application of gap analysis in determining competence, both for their own job and the jobs of other staff
- Gained an understanding and be able to apply the current regulatory framework to the compliance role.

Course

The aim of this programme is to provide delegates with the ability to take forward the demands of regulation within their own firm, within a realistic time-frame and with a clear idea of the added business value that can be achieved.

This is a 'hands on' practical course that will help you to identify the nature of the compliance officer's role and where your knowledge and skills gaps lie.

Who should attend?

Compliance officers, those likely to assume the responsibilities of a compliance role and Approved Persons generally.

Programme

- Identifying job tasks
- Identifying the knowledge and skills required for the role
- Carrying out a personal gap analysis
- Formulate a personal development action plan for the workplace.

Follow-on course

- FSA's Insurance Conduct of Business.

Benefits

At the end of the course you will:

- Know and understand the basic structure of ICOB rules
- Understand the practical implications of the application of the ICOB rules
- Be able to apply the concept of getting compliant and maintaining compliance
- Have a practical knowledge of how to plan and implement the rules within their own firms.

Course

This course will provide delegates with a thorough knowledge and understanding of the principle ICOB rules, and be able to identify their firm's current position in terms of compliance with those rules.

Who should attend?

Approved Persons and any staff undertaking regulated activity.

Programme

- The key rules
- Where are you now?
- Maintaining compliance
- Terms of business agreements, fact finding, demands and needs.

Follow-on course

- Being a compliance officer, see above.

compliance and regulatory courses

Compliance and regulatory courses

Handling client money

One day course

Dates

08 Feb/31 May/06 Sep/23 Nov

Venue

London

Cost

£330 members/£370 non-members

Managing the risk of errors and omissions

One day course

Dates

22 Feb/18 May/18 Nov

Venue

London

Cost

£330 members/£370 non-members

For bookings, enquiries and updates visit www.cii.co.uk/f2f or call Customer Service on +44 (0)20 8989 8464.

To discuss technical, in-house and bespoke courses call Face-to-Face Training on +44 (0)20 7283 3117 or email face-to-facetraining@cii.co.uk

Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Benefits

- Understand the responsibilities of firms when handling client money
- Outline the FSA's High Level Standards, which impact on handling client money
- Understand the key requirements of the CASS sourcebook;
 - Holding money as an agent of the insurer
 - Statutory and non-statutory accounts
 - Differentiating between regulated and non-regulated cash
 - Satisfying fiduciary duty
 - The Client Money Calculation
- Be able to highlight the specific FSA concerns and practical solutions
- Assess the operational implications within the participant's own firm
- Assist in identifying reviews, improvements or changes that may be required within the firm
- Be able to discuss the implications of proposed rule changes.

Who should attend?

This course is designed for directors and senior managers with client money responsibilities, accounting staff and supervisors, and compliance officers.

Programme

- Introduction to FSA regulations: zero tolerance rules within a principles-based approach
- The expectations of the Principles for Business and Senior Management Arrangements, Systems and Controls
- Senior management responsibilities
- A process map to ensure correct classification, segregation and client money handling
- Detail and depth of the FSA – CASS sourcebook rules and requirements for formal procedures: particularly;
 - Risk Transfer Agreements, co-mingling and subordination
 - The vital role for Terms of Business Agreements
 - Managing banks and accounts
 - Comparing statutory and non-statutory trust accounts
 - Legacy and 'unmatched' cash
 - Completing the Client Money Calculation and reconciliation

Benefits

- Understand what managing the risk of errors & omissions (E&O) means for you and your business
- Identify how you can demonstrate that you are managing the risk of E&O
- For qualified practitioners, knowing and understanding a core FSA philosophy and how it affects the industry.

Course

The aim of this course is to give delegates a clear understanding of what managing the risk of E&O means for authorised firms and those working within the industry. This interactive course will enable you to identify your firm's current E&O position and action plan for the future and for diploma students, cover one of the key FSA philosophies in some depth.

Who should attend?

From a CPD perspective any CII member (foundation knowledge), from a practical perspective (core competence) any senior managers, Approved Persons and compliance officers of authorised firms.

Programme

- Whose responsibility is managing the E&O risk?
- What steps the FSA expect a business to take
- How the culture of a business can influence the success of managing the risk of E&O
- What are the most common risks?
- Means of identification
- Where are you now?
- An overview of business practices which may/may not support the management of the risk of E&O
- The four C's
 - competence to do the job
 - culture and attitude
 - care and diligence
 - control and oversight (Supervision)
- Key practical examples
- E&O and Codes of Conduct.

Follow-on courses

- Treating Customers Fairly, see page 112.
- Managing conflicts of interest, see page 112.

compliance and regulatory courses

Compliance and regulatory courses

Treating Customers Fairly



One day course

Dates

20 Apr/25 Nov

Venue

London

Cost

£330 members/£370 non-members

Managing conflicts of interest

One day course

Dates

15 Apr/06 Jul/28 Oct/02 Dec

Venue

London

Cost

£330 members/£370 non-members

'In-depth knowledge and experience of the tutor helped bring scenarios to life.'

Robert, Marketing and Compliance Officer,
February 10

For bookings, enquiries and updates visit www.cii.co.uk/f2f or call Customer Service on +44 (0)20 8989 8464.

To discuss technical, in-house and bespoke courses call Face-to-Face Training on +44 (0)20 7283 3117 or email face-to-facetraining@cii.co.uk

Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Benefits

- Understand what Treating Customers Fairly (TCF) means for you and your business
- Identify how you can demonstrate that you are Treating Customers Fairly
- For qualified practitioners, knowing and understanding a core FSA philosophy and how it affects the industry.

Course

The aim of this course is to give delegates a clear understanding of what TCF means for authorised firms and those working within the industry. This interactive course will enable you to identify your firm's current TCF position and action plan for the future and for diploma students, cover one of the key FSA philosophies in some depth.

Who should attend?

From a CPD perspective any CII member (foundation knowledge), from a practical perspective (core competence) any senior managers, Approved Persons and compliance officers of authorised firms.

Programme

- Whose responsibility is TCF?
- What steps the FSA expect a business to take
- How the culture of a business can influence the success of TCF
- Where are you now?
- An overview of business practices which may/may not support the TCF principles
- Key practical examples
- TCF and Codes of Conduct.

Follow-on courses

- Managing conflicts of interest, see below.
- Managing the risk of errors and omissions, see page 112.

Benefits

- Understand what managing conflicts of interest (MCI) means for you and your business
- Identify how you can demonstrate that you are managing conflicts of interest
- For qualified practitioners, knowing and understanding a core FSA philosophy and how it affects the industry.

Course

The aim of this course is to give delegates a clear understanding of what MCI means for authorised firms and those working within the industry. This interactive course will enable you to identify your firm's current MCI position and action plan for the future and for diploma students, cover one of the key FSA philosophies in some depth.

Who should attend?

From a CPD perspective any CII member (foundation knowledge), from a practical perspective (core competence) any senior managers, Approved Persons and compliance officers of authorised firms.

Programme

- Whose responsibility is MCI?
- What steps the FSA expect a business to take
- How the culture of a business can influence the success of MCI
- Where are you now?
- An overview of business practices which may/may not support the MCI principles
 - what is a conflict of interest?
 - who is your customer?
 - identifying and managing potential conflicts
- Profit share agreements
- Volume and other over-rider agreements
- Corporate hospitality and gifts
- Key practical examples
- MCI and Codes of Conduct.

Follow-on courses

- Treating Customers Fairly, see above.
- Managing the risk of errors and omissions, see page 112.

compliance and regulatory courses

Compliance and regulatory courses

T&C supervisors' course

Two day course

Dates

16–17 Feb/20–21 Apr/24–25 Nov

Venue

London

Cost

£565 members/£670 non-members

in association with
Patterson Sales Training

'I would recommend this course to any supervisor to keep on top of T&C. The review of documentation was extremely insightful for all attendees.'

Kristian, Compliance Manager, April 10

Solvency II

One day course

Dates

04 May/08 Jul/21 Oct/25 Nov

Venue

London

Cost

£330 members/£370 non-members

Solvency II

Two day course

Dates

17–18 May/12–13 Jul/09–10 Nov

Venue

London

Cost

£565 members/£670 non-members

For bookings, enquiries and updates visit www.cii.co.uk/f2f or call Customer Service on +44 (0)20 8989 8464.

To discuss technical, in-house and bespoke courses call Face-to-Face Training on +44 (0)20 7283 3117 or email face-to-facetraining@cii.co.uk

Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Benefits

This course is designed to help firms to demonstrate they are meeting FSA supervisory requirements. Successful completion of the course will result in delegates being awarded a certificate of achievement.

Course

This course is designed for people who are supervisors operating with investment and/or mortgage advisers.

The course is specially designed to provide an independent assessment of the key supervisory skills required by the regulator. It is highly participative with delegates receiving pre-course notes so that the course can focus on the practice and assessment of key supervisory skills. It also enables the sharing of experiences and best practice so people who attend are able to take practical ideas away with them.

On completion of the course, delegates will receive a personal development plan and exercises will be returned for record-keeping purposes.

Who should attend?

Existing supervisors will benefit from honing their existing skills, updating their knowledge and having these independently assessed. People new to supervision will develop the key supervisory skills required by the regulator.

Course outline

Day 1 – T&C requirements, Assessment and Monitoring performance

- FSA T&C requirements
- Regulation and TCF – the key issues
- Assessing advisory skills using an Objective Observation Form*
- Identify strengths and prioritise development needs
- Constructive feedback meetings
- Business focused one-to-one meetings* that develop areas of weakness and build on strengths
- Using role-play exercises to enhance skills
- Using KPIs to identify trends/potential development needs.

Day 2 – Training, Coaching and Feedback

- Providing effective feedback
- Identifying development needs/ meaningful CPD
- Development plans* using effective objectives
- Training options/learning preferences
- Situational coaching, e.g. instruction versus facilitation.

* Delegates will be asked to bring along their firm's own documentation.

Benefits

- Understand what Solvency II is and the implications for insurance companies of this new European Commission legislation
- Understand the key terminology used
- Gain an overview of the new data and reporting requirements under the three pillars of the legislation.

Course

Introductory course designed to give delegates a broad overview of what Solvency II is and who is affected by it.

Who should attend?

- Solvency II professionals
- Risk managers
- Internal auditors

Programme

- Introduction to Solvency II and who is impacted by the regulations
- Look at Solvency II models of gaining and reporting the required data
- Gain a general understanding of the Solvency II three pillars.

Benefits

- Delegates will be able to describe the main provisions of the EU regulations
- Start to prepare for integrating Solvency II into existing compliance plans
- Analyse capital requirements under the new regulations
- Discuss alternative compliance strategies that could be appropriate.

Course

This two-day course will describe the upcoming Solvency II Directive as it applies to EU countries. The course will not only set out the contents of Solvency II but will provide guidance as to what insurance firms should be doing now to prepare themselves for this important change in financial regulation.

Who should attend?

- Chief risk officers
- Finance directors
- Risk directors and risk managers
- Legal advisors
- Chief operating officers
- Management consultants
- Operations managers
- Strategic planners
- Business directors and managers
- Compliance officers
- Capital managers
- Project managers
- Operational risk specialists
- Auditors

Programme

- Solvency II overview, concept and regulations
- Estimating liabilities
- Capital requirements and regulatory supervision
- Risk management
- Wider industry considerations
- Tools and techniques for risk management.

The success of the insurance and financial services sector depends on two key elements – the knowledge and capability of its people, and the vision and skill of its management. The CII's technical learning programme is therefore bolstered by courses designed to develop and enhance pure management disciplines relevant to any insurance or financial services operation. These courses equip individuals with the understanding required to run successful organisations.

executive development

118 One day MBA
120 Broker Academy management
development programme

Executive development course

One day MBA



in association with

WINMARK

One day course

Dates

03 Mar/27 Jun/26 Oct

Venue

London

Cost

£710 members/£770 non-members

**What's the most
you can achieve
in a day?**

Ever thought you'd like to do an MBA but don't have the time? Well now you can master the essentials of an MBA in an intensive one-day course.

This course is ideal for experienced insurance or financial services professionals looking to enhance their business and managerial skills.

This one-day programme will give you an oversight of the key components of a world-class MBA at a fraction of the usual cost in time and money.

It will help you to:

- Strengthen your general management skills, while acquiring critical knowledge in specific business areas
- Discover in yourself previously unknown skills and aptitudes
- Understand what it takes to be a truly effective business leader
- Challenge yourself intellectually and motivate you to take the next significant step of your career

You will leave the course exhausted but inspired – you will discover in yourself previously unknown skills and aptitudes enabling you to perform more effectively.

In association with

WINMARK



For bookings, enquiries and updates visit either www.cii.co.uk/f2f alternatively you can call Customer Service on +44 (0)20 8989 8464.

To discuss technical, in-house and bespoke courses call Face-to-Face Training on +44 (0)20 7283 3117 or email face-to-facetraining@cii.co.uk

Training courses attract up to 25 CPD credits and can also be run in-house at your premises

Benefits

The course will help you to:

- Strengthen your general management skills, while acquiring critical knowledge in specific business areas
- Discover in yourself previously unknown skills and aptitudes
- Understand what it takes to be a truly effective business leader
- Challenge yourself intellectually and motivate yourself to take the next significant step of your career.

Course

This course will bring you up to speed with the fundamentals of a world-class MBA at a fraction of the usual cost in time and money. The one day MBA programme is intense but informative – you will leave the course exhausted but inspired and will discover in yourself previously unknown skills and aptitudes enabling you to perform more effectively.

Who should attend?

This course is ideal for experienced insurance or financial services professionals looking to enhance their business and managerial skills.

Programme

- Strategy, marketing and implementation
- Differentiation and branding
- Business development and account management
- Cash flow, financial reporting and analysis
- Leadership, influence and you
- Change management and mergers.

**The one day MBA programme is intense but informative.
The run of the day is as follows:**

Start 9.00

Strategy:

Introduction to strategy; Generic tools; The strategic planning process; Business models; Strategy and implementation

Break

Financial Management:

Cash management; Cost reduction; Financial reporting; Financial analysis

Marketing:

Segmentation and mix; Marketing; Sales

Lunch

Differentiation and Branding:

Brand options; Measuring brand value; McKinsey's branding rules; Internal branding; Core competencies; Differentiation

Change Management:

Strategy; Leadership questions; Resistance to change; The change process; Case studies

Break

Leadership and Persuasion:

The role of the leader; Focus and energy; Level 5 leadership; Habits and 'One minute manager'; Influence and persuasion

Finish 17.30

At the end of the day you will be presented with a certificate confirming your completion of the one day MBA. You will also take away a folder full of comprehensive course notes which will be of great value to you when back in the workplace.

executive development

Executive development

Broker management development programme

Can attract 'Train to Gain' funding

Five day course (1 day per month)

Dates

Scheduled throughout the year by demand

Venue

Leeds, London, Manchester and others TBA

Cost

£1,545 full programme or £310 per day

Or as little as £500 when utilising 'Train to Gain' funding

in conjunction with



For bookings, enquiries and updates visit www.cii.co.uk/regionaltraining alternatively you can call Searchlight Insurance Training on +44 (0)1372 361177.

To discuss technical, in-house and bespoke courses call Face-to-Face Training on +44 (0)20 7283 3117 or email face-to-facetraining@cii.co.uk

Benefits

- Enhance and develop the additional skills needed for successful leadership
- Examine strategy and the importance of business planning
- Develop your leadership style in order to motivate and drive success within your team
- Understand financial and management accounting
- Discover the key elements of succession planning
- Sharpen and polish your sales skills and relationship management

Course

This course will help you develop the key competencies required to succeed in today's competitive environment through coverage of core responsibilities needed by senior broking staff. The course is delivered by leading market practitioners who share first-hand experience of the issues facing brokers today.

The participative workshops will examine both theory and practice to improve your understanding of the challenges encountered in running a successful brokerage.

Who should attend?

The programme specifically caters for mid-senior managers, directors and owners who have, or aspire to, strategic management responsibility within their firm.

Note: Entry to the course is not limited to those receiving funding, brokers can self fund their place.

Programme

- Strategy and business planning
- Leadership
- Financial accounting
- Succession planning and interview skills
- Sales and relationship management.

To gain the full benefit brokers are advised to attend the full programme but can opt to attend individual days.

How to gain funding?

This exclusive course can attract a substantial subsidy from the Government's flagship 'Train to Gain' initiative, which means you or a member of your brokerage can attend the entire programme at a fraction of the usual cost – as little as £500! Applying for funding is straightforward and we can guide you through the process – decisions are typically made within two weeks of submitting your application.

Further details

For more detailed information of the programme, funding eligibility and everything you need to know about applying please visit www.cii.co.uk/regionaltraining to view our helpful guide.

The Management development programme is part the regional face-to-face training suite from the Broker Academy. Developed by the CII, BIBA and AXA, the academy is a long-term strategic solution devised by the industry, for the industry.

Access the Broker Academy online at www.cii.co.uk/brokeracademy to plug into an unrivalled range of broker-specific training solutions.

“ Really enjoyed the format, lots of interaction with other delegates and the course tutor. My individual needs were taken into consideration and I had plenty to take away and put into practice at my company. ”

Management development programme delegate, Oct 10.

Once you have read the notes on completing your application, you can either:

- complete and submit your booking online at www.cii.co.uk
- phone through your order to Customer Service on +44 (0)20 8989 8464 ensuring that you have your credit/debit card details ready
- complete the form below and post or fax (+44 (0)20 8530 3052) to Customer Service.

Face-to-Face Training Booking form

FTF002 (11/10)

Please complete in BLOCK CAPITALS (one form per delegate; please photocopy this form for additional bookings)

Important note: To ensure that your application is processed correctly can you please enter your name at the top of each page in the space provided.

Section A – Personal details (Please complete all fields. Your name should be entered as you wish it to appear on your certificate.)

Have you ever had previous contact with the CII? Yes No (Please tick)

Please give your CII permanent identity number (PIN) if known

PIN

Mr/Mrs/Miss/Ms Surname

Forenames Date of birth

Employer's name

Tel Ext Mobile

email*

Work address

Postcode Country

Home address

Postcode Country

* Please take care when providing your email address as most correspondence will be sent electronically.

Tick address to be used for postal correspondence Home Work

Please only tick one box per category

Type of organisation

- (Insurance) Insurance company Broker/Intermediary Lloyd's Reinsurance company/broker
 Loss adjuster/Loss assessor Bank/Building Society Consultancy Legal
 Other

- (Financial Advice) Independent financial adviser Independent financial adviser – Network Whole of market Multi-tied
 Tied agent (Sole agent) Company (insurer/assurer) back office Bank/Building Society back office Mortgage adviser
 Investment house Other

Area of work

- (Insurance) Underwriting Claims/Loss adjusting Broking Sales/Marketing
 Risk management Administration Compliance HR/Training
 Surveying Processing
 Finance Other

- (Financial Advice) Advising clients Underwriting Claims Administration/Processing
 HR/Training Compliance Finance Product selling to advisers
 Technical adviser Other

Job category

- Administrative Technical Advisory Supervisory/Controller
 Middle management (Branch, Office, Dept) Senior management (General, Head of) Executive (CEO, Director) Business owner
 Other

Please turn over

Face-to-Face Training booking form – FTF002 (11/10)

Enter your name

Section A – (Continued)

If you are booking for someone please give a contact name:

Contact name

Job title

Tel Ext Fax

email

Section B – CII membership

(Please **ONLY** complete this section if you are applying for membership. Go to Section C if you are already a member.)

Important note: Applying for membership now entitles you to the reduced member rates where appropriate.

I wish to apply for membership of the CII Yes No

I wish to join the following local institute – UK only (See pg 122)

Please tick the relevant box to confirm whether you have:

– Been made bankrupt or been subject to an individual voluntary arrangement (or similar procedure). Yes No

– Been convicted for (or have you been charged but not yet tried with) any offence other than a monetary fixed penalty for a motoring offence. Please note, if the conviction is considered spent under the Rehabilitation of Offenders Act you should select 'no'. Yes No

– Been subject to any disciplinary sanctions (or are currently the subject of any investigation) by the CII/PFS or any other professional and/or membership body or regulatory authority. Yes No

If you have answered 'yes' to any of these questions, please also provide any relevant details on a separate sheet of paper.

Please note that as a member of the CII, you are required to let us know if you are made bankrupt; become the subject of an individual voluntary arrangement (or similar procedure); are convicted of any offence other than a monetary fixed penalty for a motoring offence; or have any disciplinary sanctions applied to you by another professional and/or membership body or regulatory authority.

Referral to Membership Application Sub-Committee. The CII reserves the right to refer such membership applications to the CII Membership Application Sub-Committee (MASC) which is a Sub-Committee of the CII Disciplinary Committee as in its absolute discretion it considers appropriate to so refer. A non-exhaustive list of instances where applications will normally be referred to MASC are where applicants have a history of bankruptcy, an individual voluntary arrangement (or a similar procedure), a criminal conviction, a disciplinary record (with either the CII or another body) or they have failed to comply with the CII's CPD requirement in the past.

In becoming a member of the Chartered Insurance Institute (CII), I agree to abide by: the CII Charter and Bye-laws; the CII Code of Ethics; all CII rules and regulations; the constitution and Bye-laws of any local institute of which I become a member; and the CII's Continuing Professional Development scheme (only applicable to qualified members). Yes

You must answer the questions on this form truthfully, including the declarations you make. Any information you provide which is misleading or untrue may result in your membership being cancelled. It may also lead to disciplinary or criminal proceedings. If there are any questions or any parts of the declarations on this form which you do not understand then you can refer to the CII website www.cii.co.uk/explanatorynotes although the CII do not accept any liability for information or clarification given.

Faculties

Please choose below which faculty you would like to join. These are forums of the CII which provide a range of services in support of individuals working in specific industry sectors – further information can be found at www.cii.co.uk/faculties

In applying for CII membership you can **join one faculty for free**. If you wish to join additional faculties please contact CII Customer Service on +44 (0)20 8989 8464.

(select one)

Insurance Broking Claims London Market Underwriting Life & Pensions
(For general insurance company employees)

Membership fees

1. An admission fee of £36 is payable by **ALL** applicants.

2(a). Please then select the appropriate member fee.

	London only*	UK and Channel isles	International**
Annual Subscription	£73	£70	£50
Monthly Subscription	£6.09	£5.84	n/a

Important notes: * This includes a £3 subscription fee for membership of the Insurance Institute of London.

**A discounted membership fee is available for individuals resident in countries categorised as 'low income' or 'lower middle income'. See page 122 for details.

2(b). Choose the method of payment. This can either be:

- by monthly Direct Debit. **If you choose this option do not complete the sub total box, but fill out the Direct Debit form at the back of this application form. The admission fee will be spread across your 12 monthly payments.**
- by cheque or debit/credit card. **If you choose this option please enter the correct amount in the sub total box, including the admission fee.**

Sub total £

(to include the
£36 admission fee)

Face-to-Face Training booking form – FTF002 (11/10)

Enter your name

Section C – Course reservation

I wish to book the following course(s)

Course title

Venue Date

Sub total £

Course title

Venue Date

Sub total £

Course title

Venue Date

Sub total £

Course title

Venue Date

Sub total £

Course title

Venue Date

Sub total £

Course title

Venue Date

Sub total £

Course title

Venue Date

Sub total £

Course title

Venue Date

Sub total £

Course title

Venue Date

Sub total £

Course title

Venue Date

Sub total £

Face-to-Face Training booking form – FTF002 (11/10)

Enter your name

Section D – Declarations

I declare that all information provided by me on this form is true and correct to the best of my knowledge.

Data protection and privacy

The CII is registered under the Data Protection Act 1998 and will ensure that in providing products and services to you, it (and its business associates) will process your personal data fairly. By submitting this application, I consent to the CII processing my data. Full details are included in the CII Data Protection and Privacy statement which is available on the CII's website.

Sharing information with your employer

The CII will, upon the employer's request, provide your employer with details of your examination record, including attempts, along with your CII Personal Identification Number unless you tick this box.

Privacy and electronic communications regulations

We may from time to time wish to draw your attention to other CII products and services electronically which are likely to be of interest to you. The CII will assume that you consent to us using your data in this way, unless you tick the following box.

Sharing your data with third parties

The CII Group will never sell your data to third parties for commercial gain. We may, however, share your data with third parties who provide products and services that complement those offered by the CII. The CII will assume that you consent to us using your data in this way, unless you tick the following box.

Terms, conditions and cancellation

I have read and agree to the terms and conditions contained in this brochure.

Your right to cancel

In accordance with The Consumer Protection (Distance Selling) Regulations 2000 you have a right of cancellation in respect of these products and services. This right shall (subject to the Regulations) expire seven working days from the day after the date on which either the products are received by you or your order for services is accepted by the CII. Should you wish to cancel, notice should be sent to Customer Service. Where products have been supplied to you prior to cancellation they must be returned to us, in the condition in which they were supplied at your expense. Reimbursement for any monies paid by you for the product or service will be made within 30 days of receiving notice of cancellation or, if products are returned to us within 30 days of their receipt.

In the event that less than seven days' notice of cancellation of a Certificate exam entry is given and the CII incurs irrecoverable cost as a result then it may recover that cost from you.

You must answer the questions on this form truthfully, including the declarations you make. Any information you provide which is misleading or untrue may result in your membership being cancelled. It may also lead to disciplinary or criminal proceedings. If there are any questions or any parts of the declarations on this form which you do not understand then you can refer to the CII website www.cii.co.uk/explanatorynotes although the CII does not accept any liability for information or clarification given.

Signed

Date

Training is provided by The Education and Training Trust of the Chartered Insurance Institute (a company limited by guarantee)
Registered office: 20 Aldermanbury, London EC2V 7HY. Registered Charity no.1021017

Face-to-Face Training booking form – FTF002 (11/10)

Enter your name

Section E – Total payable and method of payment

Insert the total value of all items ordered in Sections B to C.

Note: All prices quoted are inclusive of VAT, where appropriate, at the current rates. Prices are subject to change without notice.

Total payable £

I would like a payment receipt to be emailed to me (please be sure to provide your email address on the first page of the form).

Tick method of payment and, if applicable, complete the card details.

Cash/cheque payable to The Chartered Insurance Institute (please write CII PIN number if known on the back of the cheque).

Note: All remittances must be in Sterling. Cash should only be sent by recorded delivery. No liability can be accepted by the CII for cash sent via post. Payment from countries outside the UK must be made by banker's draft, payable in Sterling to the CII drawn on a UK bank, or by credit/debit card (Visa, Mastercard, Switch/Maestro, Solo or Delta).

Invoice (Existing corporate accounts holders can submit their bookings via email at application@cii.co.uk giving their account details. For non-account holders if you wish to be invoiced please submit your booking on headed company paper).

Credit/debit card: Please debit my/our account with the total cost of the goods and services ordered on this form.

Type of card (please tick) VISA MASTERCARD DELTA MAESTRO SOLO

Valid from* Expiry date* Issue number* (Solo/Maestro only)

Card number*

*Please complete according to the information on your credit/debit card.

Cardholder's name and address if different from above

Cardholder's Signature

Date

Please fax the completed form if paying by credit/debit card on +44 (0)20 8530 3052 or send with your cheque to CII, Customer Service, 42-48 High Road, South Woodford, London E18 2JP

If you have a UK bank account you can spread the cost of membership by paying via monthly Direct Debit at no extra charge.

By paying via monthly Direct Debit, you will automatically be entered into a prize draw to win a year's free subscription to the CII. Please call CII Customer Service on +44 (0)20 8989 8464 to set up a monthly Direct Debit over the phone or complete the Direct Debit mandate below, sign the declaration in Section D and return to CII Customer Service.

Instructions to your Bank or Building Society to pay by Direct Debit (Please complete all fields)



1. Name and full postal address of your Bank or Building Society branch

To: The Manager (Bank/Building Society)
Address
Postcode

Please complete this Direct Debit instruction if you have a **UK Bank account**.
Post only to: CII, Customer Service, 42-48 High Road, South Woodford, London E18 2JP

Originator's identification no.

2. Name(s) of account holder(s)

3. Bank or Building Society account number

4. Branch sort code

5. Reference number (CII PIN)

I wish to pay my subscription by monthly Direct Debit payments

Signature

Date

Banks and Building Societies may decline to accept instructions to pay Direct Debits from some types of accounts.

The Direct Debit Guarantee: The Guarantee is offered by all Banks and Building Societies that take part in the Direct Debit Scheme. The efficiency and security of the Scheme is monitored and protected by your own Bank or Building Society. If the amounts to be paid or the payment dates change The CII will notify you 10 working days in advance of your account being debited or as otherwise agreed. If an error is made by The CII or your Bank or Building Society, you are guaranteed a full and immediate refund from your branch of the amount paid. You can cancel a Direct Debit at any time by writing to your Bank or Building Society. Please also send a copy of your letter to The CII.

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Why choose CII Face-to-Face Training?

- Courses developed by the industry's premier professional body
- Harnesses the experience and expertise of leading practitioners with first-hand knowledge of the issues
- Training for all levels, from foundation knowledge, to qualification revision, to executive development
- Qualification revision courses proven to improve the chances of exam success by up to 50%
- Provides a stimulating, challenging and ultimately rewarding group learning environment
- Offers a range of learning opportunities to suit different needs and preferences, including long and short courses, full- and part-time attendance
- Wide range of delivery options, from scheduled courses, to in-house arrangements, to tailored or new course development
- Tried-and-tested courses with thousands of satisfied candidates
- Discounts available for CII members and corporate customers

Bookings and enquiries

The Chartered Insurance Institute, 42–48 High Road, South Woodford, London E18 2JP
tel: +44 (0)20 8989 8464 fax: +44 (0)20 8530 3052 email: face-to-facetraining@cii.co.uk

www.cii.co.uk/f2f