

Contents

Assignment 1		Assignment 4	
Defining Agency E&O Basics	1.1	Servicing Business to Avoid Agency E&O Losses	4.1
Transferring Agency Errors and Omissions (E&O) Losses	1.3	Agency Relationships and the Duties Owed	4.3
Agency Law	1.8	Servicing Clients' Insurance Claims	4.7
Federal Regulations That Have an Impact on the Agency	1.12	Placing Business in Surplus Lines and Nonstandard Market Issues	4.11
Application of States' Regulations and Unfair Trade Practices Statutes	1.16	Avoiding Agency Errors and Omissions Losses	4.15
Summary	1.19	Summary	4.20
Assignment 2			
Handling New Business to Minimize Agency E&O	2.1		
Presenting Proposals and Quotes to Minimize Agency Errors and Omissions (E&O)	2.3		
Placing the Business Once the Proposal or Quote Has Been Accepted	2.8		
Effectively Delivering the Policy to the Client	2.13		
Handling New Business	2.16		
Summary	2.22		
Assignment 3			
Handling Existing Business to Control Agency E&O	3.1		
Keeping the Client's Policy Current	3.3		
Issuing Certificates of Insurance	3.8		
Assisting Clients With Cancellations or Nonrenewals	3.14		
Handling Existing Business	3.19		
Summary	3.23		

