

# Phillips Associates

## Errors & Omissions Analysis Caravan June 2008

### **E&O Analysis #112930**

**3 Credits**

Errors & Omissions is a matter of analysis where an insurance producer asks the critical questions when evaluating an agency's systems designed to reduce E&O exposure. This course will walk the insurance producer through the transaction asking where E&O pitfalls might occur and what remedies might be appropriate. The outcome will provide an insurance producer with tools necessary to conduct his or her own analysis and provide a greater understanding as to how their own E&O policy is constructed. In addition, the course offers an explanation on how E&O policies are structured and a walk-through of the application itself.

### **ABOUT THE INSTRUCTORS**

**VINCE PHILLIPS** has lobbied for PA insurance agents and brokers (producers) since 1989. He is the lobbyist for the Pennsylvania Association of Health Underwriters and was lobbyist for IIAP and the former PA Association of Life Underwriters. He was involved in major insurance legislation spanning the industry from annuities to health insurance to Worker's Compensation.

**ANN WARD** is an Underwriter for NAMICO, the National Association of Insurance Companies' insurance company. NAMICO offers professional liability insurance for insurance agencies. Ann has also worked as an underwriter for The Hartford and has insurance agency experience.

### **WHEN and WHERE**

June 25, 2008 - 8:30 am - 11:30 am - Fort Washington - Holiday Inn,  
432 West Pennsylvania Avenue, 215/643-3000

June 25, 2008 - 2:00 pm - 5:00 pm - Kennett Square - Hilton Garden Inn,  
815 East Baltimore Pike, 610/444-9100

June 26, 2008 - 8:30 am - 11:30 am - Lancaster - Heritage Hotel (Park Plaza),  
500 Centerville Road, 717/898-2431

June 26, 2008 - 2:00 pm - 5:00 pm - Carlisle - Hotel Carlisle (Embers),  
1700 Harrisburg Pike, 717/243-1717

June 27, 2008 - 8:30 am - 11:30 am - Greensburg - hosted by, WN Tuscano Agency,  
950 Highland Avenue, 724/834-2350

June 27, 2008 - 2:00 pm - 5:00 pm - Moon Township - hosted by, HHM Insurors,  
500 Commerce Drive, 412/893-2500

**COST**

The fee for this session is \$55.00. If two or more register from the same agency the fee is \$50.00 per person. Registration fee includes hand out material and the state-mandated student filing fee of \$4.50.

**HOW TO REGISTER**

Please return this form with your check payable to PHILLIPS ASSOCIATES, 3610 Kent Drive, Mechanicsburg, PA 17050. **We do not accept credit card payments.** You may fax this form to 717/732-7255 to reserve your place or call the same number with any questions.

**Cancellation Policy: Cancellations received within two (2) working days prior to the class may be assessed a \$10.00 cancellation fee. Substitutions are acceptable.**

**NAME** \_\_\_\_\_

**AGENCY/COMPANY** \_\_\_\_\_

**ADDRESS** \_\_\_\_\_

\_\_\_\_\_

**PHONE** \_\_\_\_\_ **FAX** \_\_\_\_\_

**E-MAIL** \_\_\_\_\_

**PAYMENT** Enclosed \_\_\_ in Mail \_\_\_ Will Pay On-Site \_\_\_

**Please indicate your choice**

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