

FALL ROADSHOWS

E&O AND AGENCY COMPLIANCE SEMINAR

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

2026 Dates & Locations

Members-only events

Oct. 6 — St. Louis

DoubleTree by Hilton
1973 Craigshire Road
314-434-0100

Oct. 7 — Springfield

DoubleTree by Hilton
2431 N. Glenstone Ave.
417-831-3131

Oct. 8 — Hybrid

Jefferson City
MAIA Headquarters
3315 Emerald Lane
573-893-4301

Online:

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

Class Schedule

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

E&O seminar approved for 3 ethics CE credits in Mo. and Kan.; Agency Compliance approved for 1 ethics CE credit in Mo. and Kan.



E&O: LEVERAGING THE POWER OF PREVENTION IN SERVING CLIENT NEEDS

An agency's success hinges on its people. Each individual contributes skills, expertise and knowledge to address the agency's work. Within agencies, management assigns certain individuals to develop new accounts, while others focus on customer service. Whatever a person's role in the agency, however, each individual services the client in one way or another.

We are all human and make mistakes. Whether it's forgetting to add coverage to a customer's policy, failing to document a phone conversation or neglecting to attach an email, errors can happen. Even if you haven't experienced an E&O claim personally, you have likely heard chilling stories from colleagues or sat through E&O classes that made you briefly reconsider your career choice.

It's important to recognize that you could implement all the recommendations from this class and still find yourself facing E&O litigation. Sometimes errors occur.

More often, suits arise even when agency members haven't done anything wrong. However, agencies that adopt strong internal practices tend to have fewer claims and are better equipped to defend against those that do occur.

Fostering a healthy E&O culture within your agency involves cultivating mindfulness among employees as they perform each task. This class will cover the following topics, which will help you create that culture:

- What you need to know about E&O
- Understanding an agent's duties
- Compliance with state and federal laws
- Role of agency procedures
- Servicing customer accounts
- Documentation

If you interact with customers, don't miss the valuable insights this class will provide to help reduce your E&O exposure and protect your agency.

AGENCY COMPLIANCE LUNCHEON

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

The Agency Compliance Luncheons are:

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

Topics to be discussed include:

- ✓ Reducing ADA website litigation
- ✓ Easing burden of establishing small employer self-insured plans

- ✓ Income tax repeal
- ✓ Statute of limitation reform
- ✓ Regulation of third-party litigation funding (TPLF)
- ✓ Increasing of minimum auto liability limits
- ✓ Regulation of autonomous vehicles
- ✓ Decreasing W/C requirements for construction employers
- ✓ Joint and several liability reform
- ✓ Cancellation of home coverage due to roof age
- ✓ Stronger Homes Act



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E&O INSTRUCTOR BRANDI ANDERSON

Brandi Anderson is a seasoned sales and business development leader with over 20 years in the insurance

industry. As CEO of Tower Trio, she focuses on training future insurance leaders. With expertise in sales strategy, team leadership and client relations, she has generated over \$32 million in annual sales. Brandi is a Certified Professional Insurance Agent (CPIA) and Certified Insurance Counselor (CIC), actively mentoring others. She is involved in her community and has received multiple awards, including the PIA Insurance Woman of the Year and Nationwide's Sales Manager of the Year.

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

SWISS RE AND ALLIANZ:

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

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

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

UTICA:

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

WHEN DO I NEED TO RENEW?
Every two years

2026 E&O Seminar and/or Agency Compliance Luncheon Enrollment Form

SELECT DATE AND LOCATION:

☐ Oct. 6, St. Louis ☐ Oct. 7, Springfield ☐ Oct. 8, Jefferson City ☐ Oct. 8, Online

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

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

Organization _____ E-mail _____

Address _____ City/State/Zip _____

Phone _____ Title _____

Emergency Contact _____ Emergency Contact Phone _____

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

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

METHOD OF PAYMENT:

☐ Check enclosed or ☐ MasterCard ☐ Visa ☐ American Express ☐ Discover

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

Card Verification Code: _____ Billing Zip Code: _____

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

CANCELLATION POLICY:

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

ACCOMMODATIONS:

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