



Name: \_\_\_\_\_

Department: \_\_\_\_\_

I understand the areas....	Yes	No	I think so
<b>1. The intermediary market</b>			
The role of intermediaries			
Broker networks			
<b>2. Regulation</b>			
Development of regulation of intermediaries			
The law of agency and its application to insurance brokers			
Disciplinary procedures			
Legislation			
Accounting requirements			
<b>3. Role of the insurance broker</b>			
Understanding client needs			
Selection of insurers			
Monitoring solvency of other intermediaries			
Role of the insurance broker in the event of insurer failure or an insurer discontinuing a line of business			
Negotiation and placing of risks			
Policy wordings			
Negotiation, collection and payment of claims			
Programme design and the operation of global insurance programmes			
Electronic trading			
Role of the broker in the risk management process			
Broker's fees and remuneration			
Delegated authority			
Conflict of interest			
<b>4. Marketing</b>			
Promotional literature			
The marketing environment			
Market research			
Product development			
The sale process			
<b>5. Errors and omissions</b>			
Errors and omissions			



**Please list the most important topics you would like to cover in your training session**

- 1 .....
- 2 .....
- 3 .....
- 4 .....