

**Asking good questions
will give you good answers.**

Fiduciary Duty Never Takes a Holiday

Q: Does everyone in my agency have to take this type class?

A: Fiduciary duty is so critical to modern day agency operations that not one employee can be allowed to not know their duties to the fullest extent possible.

Q: We are not a big agency with a huge trust account, so can we skip this class?

A: Mistakes and errors have no room in this critical back room operation that must be conducted daily in agencies and brokerages. The trust account fund size has no bearing upon the need to safeguard your reputation and professionalism.

Q: Why should I worry about something that my clients never see or even ask about?

A: Demonstrating you have total compliance in trust account management is important to the reputation of your agency.

Offering peace of mind when it comes to this important function adds value to the client services you deliver.

Q: Can these classes help what we are already doing?

A: These classes will answer questions you never even knew existed.



Trust Account Management Services

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Continuing Education Classes

*Two DOI-approved CE classes on insurance
fiduciary duty and premium solvency management.*



Trust Account Management Services

Earn CE Credits and learn
our PAULMAR GROUP insurance
trust account solvency techniques.



Two Continuing Education Classes for Insurance Retailers and General Agents

For the first time in the P&C insurance brokerage industry there are now two continuing education classes offered on insurance fiduciary duty and trust account financial solvency management. These are two issues critical for insurance retailers and general agents to understand completely and be knowledgeable about what it takes to be insurance code compliant.

The single reason for these two important CE classes is to emphasize the legal consequences of improperly managing trust funds. The California Insurance Code makes mismanagement a criminal violation. Few CE classes can be labeled more crucial than these two PAULMAR GROUP developed and California Insurance Department approved classes.

Class 1: Insurance Fiduciary Duty

2 CE Credits

The first two-hour class offers insight into the fiduciary obligations of licensed insurance agents and brokers. Carrying out fiduciary duties by insurance agents and their staffs must meet numerous law requirements and regulations. Every person in the agency who performs fiduciary duties under the license issued to the agency must follow the conduct prescribed by the Insurance Code. The class focuses upon what all the duties are and what criteria must be met.

Class 2: Trust Account Financial Solvency Management

2 CE Credits

The second class focuses upon the tasks required of agents and their staff to be fully compliant. Accounting system and record keeping is key to a fully compliant agency program. Effective operation requirements are all detailed in this second two-hour CE program class.

Class 2 Pre-requisite: Class 1

*Online class environment makes
our classrooms as close as your computer.*

Contact Us Today!
800-830-9093 or
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*Enroll and Earn
Continuing
Education Credits*



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