

College of Insurance
Insurance Institute of India, Mumbai
Classroom Training Session on Exclusive Module for Principal
Officers of Corporate Agents- Banks (CT-EMPOCA)
Program ID- CPL48 (From: 12th to 13th October, 2023)

Relevance of the Program:-

The Corporate Agents Regulations (2015) of the IRDAI places onerous responsibility on Corporate Agents as intermediaries and specifically the Principal Officer (PO) of the Corporate Agent. As Nodal Officer the Principal Officer has the responsibility for successful conduct of all insurance marketing activities of the corporate agent while ensuring compliance to the regulations. Further, the PO is required to supervise the activities of the Corporate Agency and play a vital role in promoting sales and service of Insurance Products. All this requires a thorough understanding of the regulations and its imperatives, including compliance and inspection. It also calls for developing strategies for promoting insurance business.

This Program is designed with a clear appreciation of the difficulties faced by Principal Officers in understanding the rationale and import of regulatory provisions and complying with the requirements of Corporate Agents' Regulations. Though specifically designed for the needs of POs of Corporate Agents including Banks, the course may be of use to Specified Persons too to widen their horizons on regulatory framework and business strategies.

Program Objectives:-

The programme would cover the following topics:

- Corporate Agents Regulations and their Compliance
- Preparation and compliance with Inspection requirements
- Point of Sale Regulatory Requirements & Total Digital Sales Process
- Customer Relationship Management and Grievances Handling
- Life Insurance Products
- General Insurance, Health Insurance Products

Participant's Profile:-

The program is designed for Principal Officers of Banks and other corporate agents. Other specified persons including officials associated with Principal Officers can also attend.

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Course Coordinator:-

Mr. V. Jayanth Kumar 022-26544285 Email: vjayanth@iii.org.in

Program Duration & Timing: -

2 days & from 10.30 a.m. to 05.00 p.m.

Course Fees:-

- **Participants requiring residential facilities: Total amount Required –Rs. 11800/- i.e. (Rs. 10000/- plus 9% CGST + 9% SGST).**

The fees cover tuition, course material, A/C single room accommodation in the Institute's campus and full boarding (bed tea/coffee, breakfast, lunch, light refreshments in the evening and dinner). All rooms are fully furnished with attached bathroom and Internet facility.

Rooms are reserved from 12.00 noon onwards the day prior to the commencement of the program. The participants can stay till 12.00 noon next day after the conclusion of the program.

- **Non-residential participants: Total amount Required –Rs. 8496/- i.e. (Rs. 7200/- plus 9% CGST + 9% SGST).**

The fees cover tuition, course material and day boarding (i.e. tea/coffee during tea breaks and lunch for actual days of training).

Payment Terms and Conditions:-

- 1) The payment should be received by the College of Insurance before the commencement of the program.
- 2) The confirmation of registration for the program will be subject to receipt of payment.

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3) Please see below details for Bank Transfer.

Name of the Beneficiary	Insurance Institute of India
Account No.	004010100143462
IFS Code	UTIB0000004
MICR Code	400211002
Swift Code	AXISINBB004
Name of Bank	Axis Bank Ltd
Address	Fort Branch, Universal Insurance Building, Ground Floor, Sir P M Road, Fort, Mumbai – 400001.

4) For online payment mode by following the below link

https://www.insuranceinstituteofindia.com/o/COI_WebPortal/cmc/regDetails.htm?eventid=1854

Training Venue:-

Please follow below link / QR Code for Training Venue

<https://qrگو.page.link/qs2Qb>



Parking Facility:-

Public parking available at 5 minutes walking distance (Behind US Consulate).

Respond to:-

Mr. Vivek Rane	college_insurance@iii.org.in	022-26544297
Ms. Nilambari Bagde		022-26544234
Ms. Snehal Vartak		022-26544251
Ms Vrushali Nagawekar		022-26544266
Ms Jayashri Salian		022-26544324
Ms. Sneha Pednekar		022-26544290
Ms. Mrunal Satam		022-26544216

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Nomination Form

- 1) Name: _____
- 2) Address: _____
- 3) Educational Qualification: _____
- 4) Date of Birth: _____
- 5) Position Held.: _____
- 6) Mobile No : _____
- 7) Telephone No. : _____
- 8) E-Mail: _____
- 9) Alternate E-Mail: _____
- 10) Sponsoring Organisation: _____

Please affix
your
photograph
here

- 11) Food preference: Vegetarian Non-Vegetarian
- 12) Accommodation Required: Yes No

- 13) Details of Fee Paid: Cheque / D.D. No. _____ dt. _____
Drawn on _____ Bank, for Rs. _____

Signature & seal of the authority
of the Sponsoring organisation

Signature of the Participant

***Name of Co-ordinator:**

Mobile No: _____ Tel. _____

Email-Id.: _____ Company Name: _____

***This column is mandatory for those participants who are sponsored by company.**