

Classroom Training Session on Comprehensive Training Program for Principal Officers of the Corporate Agents (Including Banks) (CT) 12 to 13 May, 2026



Program Concept and Objectives: The position of a Principal Officer is a critical responsibility to discharge as he/she is exclusively appointed to supervise all the activities of the Corporate Agent. The scope of the activities is large and varied, starting from Implementation of board approved policy, procuring insurance business while ensuring strict adherence to the code of conduct, managing conflicts of interest, regulatory disclosures and compliance, working out arrangements with Insurers for distribution of products, maintaining records, providing services to policyholders, attending to regulatory Inspections and overall supervision and guidance. One essential thread which runs through all these activities is Regulatory Compliance, which requires thorough knowledge of meaning and rationale of the regulatory provisions covering all the activities. This has now become all the more challenging due to complete revamp of regulatory framework in 2024, except those regulations that deal specifically with Intermediaries. Good Growth of business year on year while complying with regulatory requirements, managing various business partnerships and servicing the customers well is a task full of challenges and requires Knowledge, Competence and Skills.

Keeping the above in view the '2 days Classroom Training' combines updated knowledge on all the areas of sales, service, business relationships and regulatory compliance along with interesting case studies and role-plays. It is designed to equip the aspiring and existing Principle Officers with all the practical knowledge required for business growth and compliance management.

Key Takeaways from the program: The program aims to provide the participants the knowledge and understanding of the following

- Important aspects of Insurance Sales Management
- Working with Win-Win paradigm of business relationships
- Training the authorized sales personnel
- Protection Policyholders' Interests Regulations, 2024
- AML Requirements
- Open Architecture and Conflicts of Interest
- Disclosures and other Compliance requirements to IRDAI
- Arrangements with Insurers for distribution of Products
- Record Maintenance and servicing of policyholders
- Tele marketing and Digital Marketing
- Regulatory Inspection of Corporate Agents
- Changes in the Regulatory Framework in 2024 relevant to Intermediaries
- Insurance Laws Amendment Act, 2025

Participant Profile:

- Principal Officers of the Corporate Agents including Banks working as Corporate Agents.
- Those persons who aspire to be Principal Officer (or those assisting) including experienced Specified Persons of Corporate Agents, the employees managing Corporate Agency, Bank tie-ups.
- Anyone connected with Insurance Sector and keen to learn about the subject

Program Fees:

- **Participants requiring residential facilities: Total amount Required – Rs. 12980/- i.e. (Rs. 11000/- 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. 9440/- i.e. (Rs. 8000/- plus 9% CGST + 9% SGST).**
(The fees cover tuition, course material and day boarding (i.e. breakfast, lunch and tea/coffee during tea breaks for actual days of training).)

Program Duration & Timing:

Program Date: 12-13 May 2026

Duration: 2 days (CT)

Program Time (IST):

10.00 AM to 05.00 PM

Program Coordinator:

Mr. V Jayanth Kumar, Faculty

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Contact No: 022-69654285

Program ID : CPL



WEBSITE:

www.insuranceinstituteofindia.com

PROGRAM VENUE:

College of Insurance, Insurance Institute of India,
Plot No. C-46, G-Block, Bandra-Kurla Complex, Mumbai - 400 051.

Please follow the link / scan QR Code for training venue



<https://qr.go.page.link/qs2Qb>

PROGRAM TEAM:

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