

**College of Insurance**  
**Insurance Institute of India, Mumbai**  
**Classroom Training Session on Enhancing the Productivity of**  
**Specified/Authorized Persons of Banks, other Corporate Agents**  
**and Brokers (CT-EPSP)**  
**Program ID- CPL36 (From: 8<sup>th</sup> to 9<sup>th</sup> August, 2023)**

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**Relevance of the Program:-**

It is widely agreed that compared to the vast potential of the bancassurance and Corporate Agency/Broker channels, the actual performance in terms of business leaves much to be desired. Activization of branches continues to be a big challenge. Under the circumstances the role of specified persons in banks and other Corporate Agents, Brokers through whom business is to be solicited comes under focus. There is a need to improve the understanding of these specified/authorized persons about basic concepts of Insurance, Product categories and conviction in the concept of Insurance. It is also equally important to clarify and resolve satisfactorily the conflict about core business priorities and that of third parties by placing the bank Customer Needs in the focus.

Keeping the knowledge needs of specified persons of banks, corporate agents, brokers in the mind, this two day classroom session is designed.

**Program Objectives:-**

At the end of the two day training program, the participants will be able to

- Appreciate and understand the basic insurance concepts
- Understand the basic insurance product categories
- Exposed to fundamentals of life insurance selling
- Customer need assessment and Suitable Product recommendation
- Importance of bancassurance/Corporate agency/brokers in Customer financial need fulfilment & importance of non-interest income

**Program Contents:-**

- Basic principles of Insurance (Life & General)
- Insurance Product Categories, USPs, Life stages (Life & General)
- Fundamentals of Insurance selling
- Regulatory requirements in Insurance selling
- Customer need assessment and Product Recommendations (Life Insurance)
- Importance of bancassurance/C.A/Broker in fulfilling Customer financial needs and fee based income

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- Record maintenance and post-sale service

**Program Methodology:-**

Involves classroom lectures, Interaction, power-point presentations, Videos, Case study etc

**Participant's Profile:-**

Specified/Authorized persons of banks, corporate agents and brokers involved in Insurance marketing and Principal Officers / Corporate Insurance Executives in banks, corporate agents, brokers.

**Course Coordinator:-**

Mr. V. Jayanth Kumar      022-26544285      Email: [vjayanth@iii.org.in](mailto: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.

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- 2) The confirmation of registration for the program will be subject to receipt of payment.
- 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/eventDetails?eventid=1764](https://www.insuranceinstituteofindia.com/o/COI_WebPortal/cmc/eventDetails?eventid=1764)

**Training Venue:-**

Please follow below link / QR Code for Training Venue

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



**Parking Facility:-**

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

**Respond to:-**

Mr. Vivek Rane	<a href="mailto:college_insurance@iii.org.in">college_insurance@iii.org.in</a>	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. No.: \_\_\_\_\_

Email-Id.: \_\_\_\_\_ Company Name: \_\_\_\_\_

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