



भारतीय बीमा संस्थान  
**INSURANCE  
INSTITUTE OF  
INDIA**



# Transforming Talent for Tomorrow



**कॉलेज ऑफ इन्श्योरेंस**

**COLLEGE OF INSURANCE**

**2025-2026**

(Life Insurance Training Programs)



## भारतीय बीमा संस्थान गीत III ANTHEM

अंधकार मिटे अज्ञान का, ज्ञान का प्रकाश हो ।  
बीमा का विस्तार हो, सुलाभ कारोबार हो॥

ज्ञान योग से सिद्धि हो, सक्षम हों समृद्धि हो॥  
यही हमारा नारा है । यही उद्देश्य हमारा है॥

पूरब हो या पश्चिम हो, उत्तर हो या दक्षिण हो ।  
गांव गांव में, शहर शहर में, बीमा ज्ञान दिलाते है ।

जन्म हुआ है पचपन में, एक नही एकनब्बे है ।  
भारत के संग विश्व में हम, बीमा ज्ञान फैलाते है ।

आओ सब प्रयास करे, जहाँ भी बीमा ज्ञान हो ।  
भारतीय बीमा संस्थान हो, भारतीय बीमा संस्थान हो ।

खेत हो खदान हो, वाहन हो विमान हो,  
जीवन हो या अजीवन हो। धन दौलत सामान हो ।

ज्ञान योग से सिद्धि हो, सक्षम हों समृद्धि हो॥  
यही हमारा नारा है । यही उद्देश्य हमारा है॥

सबका ज्ञान दिलाते है । बीमा ज्ञान दिलाते है॥  
देश का विकास हो, जन-जन का विश्वास हो ॥





## Vision

To be a professional institution of global repute, dedicated to education, training and research in insurance and allied services, thereby developing skill and competency, for all the associates of the insurance industry in India and abroad.

## Mission

- To conduct professional certification programs of international standard in the area of insurance, risk management and related subjects by offering high quality content and conducting examinations.
- To offer professional training through various pedagogy for entire insurance ecosystem.
- To disseminate knowledge through seminars, conferences, webinars, journals and newsletters.
- To work in collaboration with Corporates, Policy makers, Education Institutions and others to help spread the insurance awareness and education.
- To provide cutting-edge research in contemporary and critical areas of insurance, dissemination of insurance information to individuals, corporates, policy makers and other users of insurance.

## Introduction to III

The Insurance Institute of India (III) formerly known as the Federation of Insurance Institutes (J.C. Setalvad Memorial) was established in the year 1955, for the purpose of promoting Insurance Education and Training in the country. Institute qualifications are held in esteem both by the regulator and the industry. In its role as a leading education and training provider, I.I.I. is closely associated with all the segments of the insurance industry which include the Insurance Regulatory and Development Authority of India (IRDAI), and public and private sector insurance companies as well.

### The main objectives of Insurance Institute of India are:

- ☞ To run College and conduct examinations, oral and written, in insurance theory and practice and related subjects for awarding certificates, diplomas and degrees to those interested in insurance. To give oral and postal tuitions, prepare and supply reading materials and similar other educative methods for encouraging and assisting the study of any subject bearing on any branch of insurance.
- ☞ To offer scholarships, grants and prizes for research or any other educational work bearing on insurance. To ascertain the law and practice relating to all matters connected with insurance and to disseminate such knowledge among those interested in insurance.
- ☞ The activities and programmes of the Institute, among others, assist people in the insurance Industry, to acquire the skills and expertise to meet the growing needs of multiplicity of customers- the objective being to enhance professional insurance service to the millions in this country.

The Institute's registered office is located at Mumbai and is registered under the Societies' Registration Act, 1980.

There are at present 91 Associated Insurance Institutes spread all over the country. The Sri Lanka Insurance Institute and Financial Institutions Training Institute, Bhutan are affiliated to the I.I.I. The members of the Associated Institutes and the Affiliated Institutes automatically become the members of the I.I.I.

## Introduction to COI

College of Insurance (COI), formed in 1966, the training arm of III, provides training in all technical domains of Insurance round the year. A large number of private and public sector insurers, brokers, surveyors and others from India and abroad benefit from its classroom sessions, workshops and seminars. College of Insurance is in the fifty-seventh year of its existence in Mumbai as of 2023. The College has a Kolkata Chapter, opened in November 2016 which caters to the training needs of the Eastern States of India and the countries in its neighborhood.

## Governing Body of III

**President:** The President of Insurance Institute of India is the Chairperson/ CMD's of LIC of India, GIC Re and The New India Assurance Company Limited by rotation. The term of President is for two years.

**Deputy President:** There are total Six Deputy presidents elected amongst the Council. The term of Deputy President is for one year.

### Council:

- ☞ The management and control of the Institute and its property, affairs and business shall be carried on by and vested in the Council subject to the provisions of the Memorandum and Regulations of the Institute. Subject as aforesaid, the Council shall have power from time to time to make, revoke and vary rules and/or bye laws for the conduct of the business and affairs of the Institute and the Council, and to appoint Committees from among its own members and/or others and to delegate to such committees such of its powers as it may deem expedient.

- ☞ The Council is the governing body. It has 59 members of which 30 are Corporate Members (15 member from LIC of India and 15 members from GIC Re, The New India Assurance Co. Ltd., National Insurance Co. Ltd., The Oriental Insurance Co. Ltd. and United India Insurance Co. Ltd. (3 each)). The remaining 29 Voting Council Members are from the Associated Institutes of the Insurance Institute of India. Members representing the corporate sector are top executives of their respective insurance companies.



## President of Insurance Institute of India



**Shri. Siddhartha Mohanty**  
CEO & MD  
LIC of India

**Shri. Siddhartha Mohanty**, currently serving as the CEO & MD (erstwhile Chairperson) of LIC of India, one of the world's leading insurers, brings with him a wealth of experience and academic credentials. Holding a Bachelor's degree in Law and a Master's degree in Arts (Political Science) from Utkal University, Bhubaneswar, Odisha, along with a Post Graduate Certification in Business Management from the Xavier Institute of Management, Bhubaneswar, Odisha, he has been at the helm of LIC since April 29, 2023.

He was the company's Managing Director before taking on the current position. LIC underwent significant transformation at that point to become a listed entity. Prior to becoming Managing Director, Shri Mohanty held various important positions in the organization in a number of different capacities, including COO and CEO of LIC Housing Finance Limited. During the long and illustrious career, he has held various pivotal positions in LIC of India, such as, Senior Divisional Manager of multiple Divisions, Chief (Legal), Chief (Investment – Back Office), Executive Director (Legal), amongst others. During his tenure as Chief (Legal), Mumbai, the Corporation won the "Best Insurance In-House Legal Team of the Year" Award.

Beyond LIC, Shri. Mohanty chairs the boards of several national and international subsidiaries and associate companies. Additionally, he holds key positions such as Chairperson of the Council of Insurance Ombudsman, Chairman of the Governing Board of the National Insurance Academy, and membership in the Council of the Institute of Actuaries of India.

His leadership style, marked by innovation, analytical prowess, and strategic acumen, has consistently delivered success across diverse assignments. With a comprehensive understanding of the industry landscape, he advocates for digital transformation and investments in competency development as essential pillars for LIC's continued success.

### Message

*It is an immense pleasure to present the Annual Brochure 2025-26 of the College of Insurance (COI), the esteemed training arm of the Insurance Institute of India. This brochure transcends the role of a mere document; it serves as a testament to the institution's core principles – its vision for excellence, its deeply held values, and its unwavering dedication to cultivating a highly skilled and knowledgeable workforce within the dynamic insurance sector.*

*The COI's mission is intricately aligned with India's ambitious national objective of achieving "Insurance for all by 2047." To achieve this, the College meticulously designs its diverse range of courses to anticipate and address the continually evolving needs of the modern insurance industry. The carefully curated curriculum seamlessly integrates robust theoretical foundations with invaluable practical, real-world applications – a crucial element for fostering a truly effective, impactful and professional learning experience.*

*I extend my best wishes to all members of the College of Insurance community as they strive to achieve the institution's noble objectives and cultivate a thriving, impactful, and enriching learning environment for all.*



## Secretary General of III



**Shri. P. Jaipuria**  
Secretary General  
Insurance Institute of India

**Shri. P. Jaipuria** took over charge as Secretary General, Insurance Institute of India, Mumbai on 11th November, 2024. He began his career with LIC in September 1989 as a Direct Recruit Officer. He has worked in different assignments at Eastern Zone, East Central Zone, South Centre Zone, Northern Zone and Central office of LIC as Branch Manager, Senior Branch Manager, Chief Manager, Marketing Manager, and Senior Divisional Manager.

This apart, he has put in 15 years in administrative and managerial capacities in various departments such as New Business, Information Technology, Estate and Office Services, Estate Management, and Employees Relations Discipline.

Prior to his current role, he served as a Director of the College of Insurance at the Insurance Institute of India. He is passionate about project management, resource development, customer-centric strategies, and optimization of productivity and performance. His leadership is driven by a commitment to creativity, collaboration and fostering a strong organizational culture.

## Director of COI



**Ms. Kavita Manmohan**  
Director  
College of Insurance

**Ms. Kavita Manmohan** took over the charge as Director, College of Insurance, Mumbai on 22nd April 2025. She started her career with Life Insurance Corporation of India as a 17th Batch Direct Recruit Officer in 1989. Across a career spanning over 36 years, she has a rich experience in different operational areas like Personnel & Industrial Relations, Audit, Information Technology, Office Services and Claims.

She is a graduate with honors in Economics and further holds the distinguished fellowship of the Insurance Institute of India. She has a natural inclination towards training and human resource development, complemented by her strong interpersonal skills. A keen observer of socioeconomic, global, and political trends, she brings insightful perspectives on their impact on the insurance industry.

Prior to this assignment, she served as Regional Manager (Personnel & Industrial Relations) for the North Central Zone from May 1, 2023. In this role, she played a key role in the effective deployment of staff resources and the implementation of impactful training initiatives. Throughout her tenure with LIC, she has held several pivotal positions, including Secretary (P&IR) at Zonal Offices in Kanpur and Delhi, Secretary (Audit) at the Delhi Audit Centre, Faculty Member at the Zonal Training Centre in Agra, and Manager roles in IT, OS, and Claims across various Divisional Offices of LIC of India.



## Faculty Profile of COI, Mumbai



**Dr. George E. Thomas**  
Professor (Research and  
Non-Life Insurance)

**Dr. George E. Thomas** joined the Institute/College in 2010. His qualifications include Ph.D., FIII, ACII, MBA, MA (English), MA (Soc.) and BGL. He is a Chartered Insurance Practitioner (UK), Fellow of the Indian Council of Arbitration and Member of the Indian Institute of Public Administration.

His insurance industry exposure started with the Tariff Advisory Committee (TAC) where he joined in 1985 and served as Chief Manager from 2006 to 2010. He had a brief tenure in IRDAI as OSD in 2009-2010. His experience includes insurance regulation, tariff revision, product design, health insurance and non-life insurance. He has worked on various committees on policy wordings, data definitions, data analysis and contributed in creating TAC's data warehouse, the precursor of today's Insurance Information Bureau.

He is Member of the Law, Regulation and Resilience Policy (LRRP) Working Group of the Insurance Development Forum (IDF). He has served as International Insurance Society's Ambassador for India, Member, Academic Steering Committee on Financial Inclusion, International Cooperative & Mutual Insurance Federation, Member, Advisory Board for the 'ICMIF - Cambridge Institute for Sustainable Leadership (CISL), and Member, Advisory Group (NL), Finance Ministry, Govt. of India. An approved Research Guide of University of Mumbai, Dr Thomas' research experience/ interests include disaster risk financing, housing/ property, logistics/ marine, mutual/ microinsurance, health insurance, capacity development, insurance regulations and fraud prevention. He can be contacted at <thomas@iii.org.in>.



**Dr. Ramesh Kumar Satuluri**  
Assistant Professor  
(Research & Life Insurance)

**Dr. Ramesh Kumar Satuluri** joined College of Insurance (Insurance Institute of India) as Faculty-Research on 5th October 2023. Prior to this, he was working with HDFC Life Insurance as Zonal Training Manager & National Training Manager (Learning & Development) for 14 yrs. He was heading Variable Channel and Direct Channel as National Training Manager during his stint with HDFC Life. His earlier stint includes working with ICICI Securities and TATA AIA Life as Regional Product Manager and Regional Training Manager respectively. He has spent considerable time with NIIT limited as Faculty.

Dr. Ramesh Kumar Satuluri is a Commerce Graduate and Law Graduate. He completed his MBA, MCOM, MPHIL and PHD in Finance. On professional front, he is a FIII (Insurance Institute of India), ALMI (Life Office Management Association), Certified Financial Planner (FPSB), Master Financial Advisor (LIMRA), Certified Trainer (Kinder Brothers International), Certified MF Distributor (AMFI) and completed GNIIT (NIIT). He attended Executive Development Program from Indian Institute of Management, Bangalore.

Dr. Ramesh Kumar Satuluri was awarded PHD on "Factors influencing profitability of Life Insurance Companies in India". He has contributed many articles in peer reviewed journals/UGC Care/Financial Planning Journals. He has presented papers in various seminars on his area of study. He can be contacted at <ramesh@iii.org.in>.





**Shri. Krishna Mohan Y.**  
Faculty (Life Insurance)

**Shri. Krishna Mohan Y.** joined the college of Insurance as a Full time Faculty (life insurance) on 16th March, 2022.

He is a Graduate in Physics from Andhra University Visakhapatnam, fellow of Insurance Institute of India. He had Post Graduate Diploma in Financial Management from NMIMS Mumbai, Senior Management Program Certificate from IIM Calcutta & Leadership Development certificate from Jack Welch Institute.

He got more than 38 years of exposure in Life Insurance Industry with rich experience in Operations, Sales management, Channel development, Marketing, Sales Strategy, Project Management and Learning & Development (L&D)

He joined LIC of India in March 1986 and worked in Operations, IT, Sales and marketing in various capacities of AAO, AO and Branch Manager for 19 years. He then worked with HDFCLife and Edelweiss life Insurance and held Senior Management positions. During this period, he headed regional and zonal Sales and Marketing teams, Partnership Channel, Sales training teams, Learning and Development teams. He headed many projects at corporate offices, viz, New Branch opening, Performance turnaround for broken branches, Reward and Recognition schemes for Advisors, Unit Managers and Branch managers, long & short term strategies and tactical interventions. He personally conducted training programs like, induction training, Orientation training, Train The Trainer (TTT), MDRT motivational programs, Business Insurance, Agency Management, transformational and other leadership trainings for Senior Managers. He personally conducted more

than 50 diverse soft skill programs for middle to senior management teams. He can be contacted at <ykmohan@iii.org.in>.



**Shri. V. Jayanth Kumar**  
Faculty (Life Insurance)

**Shri. V. Jayanth Kumar**, a post graduate from Andhra University, Vishakhapatnam, is an Associate of Insurance Institute of India (III) and holds International Post Graduate Diploma in Life Insurance from Institute of Insurance and Risk Management (IIRM). Joined LIC of India as direct recruit officer in 1986 and worked for 25 years in various capacities which include being in charge of branches and divisions, faculty member at Zonal Training Centre, Regional Manager in charge of marketing through Bancassurance and alternate distribution channels.

After taking voluntary retirement from LIC of India, he joined Insurance Regulatory and Development Authority of India (IRDAI) in 2011 and worked for 11 years as Joint Director/General Manager and as Chief General Manager, heading life insurance department dealing with regulation and supervision of life insurance industry in India. During the stint with IRDAI, Shri. Jayanth Kumar had the opportunity to complete International Fellows program conducted by National Association of Insurance Commissioners (NAIC), USA in 2012.

He also represented IRDAI-India as member of Market Conduct Working Group of International Association of Insurance Supervisors (IAIS), attended several international conferences, participated in the IAIS work of revision of two of the ICPs pertaining to Intermediaries (ICP 18) and Conduct of Business (ICP 19) and preparation of various application and issues papers. His interests and passions include training/academics, music, spirituality, books and travel. He can be contacted at <vjayanth@iii.org.in>.





**Shri. Deepak Sangal**  
Faculty (General Insurance)

**Shri. Deepak Sangal** joined the College of Insurance as Faculty on 01 March 2023. He is a Graduate in Engineering and an Associate of Insurance Institute of India (III). He joined United India Insurance Co. Ltd. in 1988 as Risk Engineer. He has worked for 32 Years in various operational and controlling offices in the Western and Northern regions. Conducted extensive risk inspections ranging from Engineering Units, Steel Plants, Thermal Power Plants, Hydro Power Plants, Nuclear Power Plants, Petrochemical / Fertilizer Plants etc. Conducted training programs for various Corporates. Handled Underwriting & Claims of Mega Risks. He was on deputation to National Insurance Academy for a period of 3 years. He took VRS in the position of Regional Manager in 2020. His interest / hobbies include academics, sports, travel. He can be contacted at <dsangal@iii.org.in>.



**Dr. Sanjay N. Tupe**  
Faculty (Economics)

**Dr. Sanjay N. Tupe**, presently working as faculty in Economics at College of Insurance (Insurance Institute of India) Bandra- Kurla Complex, Mumbai. Earlier, he worked as Professor, and Head of Dept. of Banking and Finance at B.Y.K. College of Commerce, Nashik. He discharged responsibility as in-charge Principal and Director (Research), at RNC Arts, JDB Commerce, and NSC Science College, Nasik Road for one year. Also worked as Member on Board studies in Banking and Finance and Business Economics at S.P.P.U, Pune and Kaviyatri Bahinabai Chaudhari (North Maharashtra) University, Jalgoan, Dr. Homi Bhabha State University, Mumbai. He did master degree in Entire Economics from Pune University, earned M. Phil from Amravati University and LL.B. from Pune University. He is university first ranker (Pune University) in Post Graduate Diploma in Capital Market Management. He also obtained PhD (Economics and Finance) from Indian Institute of Technology Powai, Mumbai, in August 2009, He is Post Doctorate Fellow in Economics of OUCIP, Osmania University, Hyderabad (Funded by American Consulate). Visited Germany and Netherland for research paper presentation in the International conference.

He is life member of academic bodies: The All India Marathi Arthashastra Parishad Mumbai, Indian Economic Association, The Indian Econometric Society, Input-output Research Association of India and Think line. He can be contacted at <tupe@iii.org.in>.



**Shri. Subash Chandra  
Pattanayak**  
Faculty (Life Insurance)

**Shri. Subash Chandra Pattanayak**, joined Insurance Institute of India, Mumbai as a Faculty (Life Insurance) in the College of Insurance, Insurance Institute of India on 1st September, 2023 after his superannuation from LIC of India in the scale of Executive Director on 31st July 2023. Shri Pattanayak started his career in LIC of India as a Direct recruit Assistant Administrative Officer (AAO) in the year 1990 and carries a vast and rich experience of 33 years of various positions in LIC of India. He has overseen leadership assignments involving business development, profitability improvement, ensuring compliance and risk management, close interface with Independent Board on regulatory and governance matters. Prior to his present assignment at III, he has held several important positions in LIC of India such as CEO & MD LIC (Sri Lanka), CEO & MD LIC(Nepal), Senior Divisional Manager(In-charge) of 2 premier divisions – Pune 2 & Kolkata Metropolitan Divisional Office 1, Chief Administrator & Faculty – National Insurance Academy, Pune. He has undergone training on “Life Insurance Business Leading Towards Sustainable Profitability” from IIM, Bangalore, “Business Leadership” from Indian School of Business, Hyderabad (ISB, Hyderabad, India), “Case Writing Workshop” from The Case Centre, UK and Direct Trainer Skills Programme (DOPT, GOI). Shri Pattanayak was a part and parcel of Research Paper on the subject of “A Perception of the Middle and High-Income Millennials about the Need for Pension and their Retirement Preparedness” in National Insurance Academy, Pune. He was Conferred with “Awards of Excellence in Insurance” from Top Management Consortium, Pune in

2013-14. Shri Pattanayak holds a Bachelor’s Degree in Agriculture from College of Agriculture, Odisha University of Agriculture & Technology. He is also a Fellow member of Insurance Institute of India(FIII). He can be contacted at <pattanayak@iii.org.in>.



## Secretaries of III



Shri. Kedar P. Sant

**Shri. Kedar P. Sant** is the Secretary of the Insurance Institute of India. He holds a B.Com. degree from Mumbai University as well as a post-graduate diploma in computer software, systems analysis, and application from the Board of Technical Education of the Government of Maharashtra. He joined the Insurance Institute of India in 1999 and has experience working with the institute's information technology department. At the present time, he is in charge of the departments of professional examinations, regulatory examinations, personnel and establishments.



Shri. Manish Raikar

**Shri. Manish Raikar** is presently the Secretary of Insurance Institute of India. He joined the Institute in 1999. Over a period of 25 years he has worked in the Institute in various capacities and handled various portfolios viz. Examination, Content Development, Secretarial, Accounts, Investment and taxation. Presently, he is handling College of Insurance, Accounts, Investment, Taxation, Sale of Study Courses and Secretarial department. He is Graduate in Commerce and completed Honors Diploma in Information and Systems Management. He is also a Fellow of Insurance Institute of India.

# COLLEGE OF INSURANCE



## Bespoke (Customised) Training Programs

During the last few years, the College of Insurance has been conducting Bespoke Training Programs which are designed for the Insurance Companies and other entities in addition to the calendar programs which are scheduled for the year. These programs are customised for Insurance Companies and entities like broking houses, the IIISLA, State Government departments, Banks, Regulators and, above all, for Regulators and Insurance Companies from abroad.

The customised training modules are developed keeping in view the academic requirements of each individual organization after discussion between their departments and the College of Insurance faculty. Topics include Life, Health, Fire, Marine, Liability, Aviation, Regulations, Marketing, Reinsurance, Motor, Claims, Underwriting, Micro Insurance, Anti-Fraud, Risk Management, Actuarial, etc. Enquiries can be sent to College of Insurance on the email id: <college\_insurance@iii.org.in> More importantly, Induction Programs of up to six weeks have been customized for different Insurance Companies.

The College of Insurance has already conducted 67 bespoke programs in Mumbai and 6 in Kolkata Campus in the financial year (i.e. 2024-2025)

## Program Calendar for 2025-26

## Mumbai Campus

Sr. No.	CP/ IP	Name of the program	Program Date	Prog. Mode	Online	Fees for Residential	Fees for Non Residential	Branch	Designed for
<b>April 2025</b>									
1	CP	Communication as a Tool for Customer Engagement and Retention Level : Basic	7 Apr., 2025	CVT	₹ 1500/- + GST	-	-	Life	CRE, CRM personnels of Insurance companies.
2	CP	Elevate Your Brand Through Operational Excellence in Customer Service Level : Middle	8-9 Apr., 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Life	Managers and senior managers of Life Insurance companies, specified persons (Banks) and Broking companies.
3	CP	Legal & Regulatory Compliance in Insurance Level : Advanced	15-16 Apr., 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Life	Middle level to Senior executives in Legal and Compliance Departments of Insurance Companies.
4	CP	Financial Planning : Focus on Tax Planning Level : Middle	17 Apr., 2025	CVT	₹ 1500/- + GST	-	-	Life	Sales Managers, Professional Advisors of Life Insurers, Club Members and Potential MDRTs.
5	CP	Certified Insurance Anti Fraud Professional (CIAFP) Level : Advanced	21-23 Apr., 2025	CVT	₹ 7500/- + GST	-	-	Common	Minimum Licentiate from III who have already registered for III's Certified Insurance Anti- Fraud Professional (CIAFP) course.
6	CP	Catastrophic challenges for insurance Industry Level : Middle	28-29 Apr., 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Common	Practitioners in insurance and actuary areas, working in the technical, finance, and claims departments of insurance industries, and who are looking at developing effective managerial skills.



Sr. No.	CP/ IP	Name of the program	Prgram Date	Prog. Mode	Online	Fees for Residential	Fees for Non Residential	Branch	Designed for
<b>May, 2025</b>									
7	CP	Transforming Customers into Brand Ambassadors : Strategy for Insurance Level : Basic	6 May, 2025	CVT	₹ 1500/- + GST	-	-	Life	Insurance professionals, Marketing and customer experience, Business leaders.
8	CP	Comprehensive Training Program for Principal Officers of the Corporate Agents (Including Banks) Level : Advanced	7-8 May, 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Life	Principal Officers of the Corporate Agents including Banks, the Employees Managing Corporate Agency, Bank tie-ups.
9	CP	Compliance Governance and Risk Management (IRCC) Level : Advanced	7-9 May, 2025	CVT	₹ 7500/- + GST	-	-	Common	Associate / Fellow Members of Institute of Company Secretaries of India and Insurance Institute of India registered for the "Compliance Governance and Risk Management in Insurance
10	CP	Risk Based Capital Level : Middle	13 May, 2025	CVT	₹ 1500/- + GST	-	-	Common	Senior and middle level insurance executives interested in understanding the RBC Framework and its implications, Finance and accounting professionals, Risk managers in ERM or related departments.
11	CP	Comparative Analysis and Performance of ULIPs & Mutual Funds Level : Middle	13-14 May, 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Life	Executives of Insurance Companies, Brokers, Corporate Agents, Specified Persons, Insurance advisors, MF distributors.
12	CP	Impactful Selling Strategies Level : Middle	13-14 May, 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Life	Life Insurance Agents and all those associated in insurance marketing in their various capacities

Sr. No.	CP/ IP	Name of the program	Prgram Date	Prog. Mode	Online	Fees for Residential	Fees for Non Residential	Branch	Designed for
13	CP	Program on AML, KYC and CFT Requirements Level : Middle	27 May, 2025	CVT	₹ 1500/- + GST	-	-	Common	Junior and Middle management executives, Principle Compliance Officers, executives responsible for compliance of AML in Life/ General Insurance Companies, Corporate Agents, Brokers and other Intermediaries.
14	CP	Understanding IFRS 17 Level : Middle	28 May, 2025	CVT	₹ 1500/- + GST	-	-	Life	Junior to Middle managerial level executives working in Finance and Accounts, Actuarial and Valuation Department of an Insurance Company.
<b>June, 2025</b>									
15	CP	Recent Dynamics of Arbitration Clauses applicable to Insurance Industry Level : Advanced	4 Jun., 2025	CVT	₹ 1500/- + GST	-	-	Common	Insurers, Underwriters, and others who are involved in officer, Research and Managerial Roles. Officers and person concerned of the research and legal department, Bank Personnel, Corporate Lawyers, students of law.
16	CP	Personal Financial Planning : Focus on Insurance Planning Level : Middle	5-6 Jun., 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Life	Executives working for Insurance Companies, Brokers, Corporate Agents, Specified Persons, Insurance advisers.
17	CP	Investment Management in Life Insurance Companies Level : Middle	10 Jun., 2025	CVT	₹ 1500/- + GST	-	-	Life	Investment managers at junior and middle level working in Investment department/other departments.
18	CP	Workshop on Soft Skills for Junior and Mid-level Operations Executives Level : Middle	10-11 Jun., 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Common	Junior to Middle Managers from Sales, marketing, operations, New Team leaders of Life, General and Health Insurance companies and executives from Corporate Agents, Banks as well as Brokers.



Sr. No.	CP/ IP	Name of the program	Prgram Date	Prog. Mode	Online	Fees for Residential	Fees for Non Residential	Branch	Designed for
19	CP	TERM Insurance Market in India -Trends, Opportunities and Challenges Level : Basic	12 Jun., 2025	CVT	₹ 1500/- + GST	-	-	Life	Insurance professionals, Marketing and sales teams, Product managers, Regulatory and compliance professionals.
20	CP	Customer Service and Claims Management Level : Middle	16 Jun., 2025	CVT	₹ 1500/- + GST	-	-	Life	Executives working in Insurance Companies, Broker firms, Specified Persons working in Banks, Corporate agents, etc.
21	CP	Master Circular on Life Insurance Products Level : Basic/Middle	24 Jun., 2025	CVT	₹ 1500/- + GST	-	-	Life	Insurance professionals, Marketing and sales teams, Product managers and Bank Assurance Managers, Regulatory and compliance professionals.
<b>July, 2025</b>									
22	CP	Workshop on Synergy in Action: Mastering Team Dynamics and Building Strong Interpersonal Connections Level : Middle	2-3 Jul., 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Common	Middle level executives working in Marketing and HR functions in Insurance Companies, Broking, IMFs, as well as Agent Managers.
23	CP	Pensions and Retirement Solutions Level : Basic	7 Jul., 2025	CVT	₹ 1500/- + GST	-	-	Life	Marketing executives, HR executives working Insurance Companies and any Individual interested to learn about Pension Products and Retirement Planning.
24	CP	Corporate Governance and Regulatory Compliances in Insurance Level : Advanced	8-9 Jul., 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Life	Middle and Senior level executives of all Insurance Companies (Life, General, Health ) in Compliance, Senior executives in all functions, Board Secretariat.
25	CP	ANNUITY Market in India - Trends, Opportunities and Challenges Level : Basic	10 Jul., 2025	CVT	₹ 1500/- + GST	-	-	Life	Insurance professionals, Marketing and sales teamsRegulatory and compliance professionals.

Sr. No.	CP/ IP	Name of the program	Prgram Date	Prog. Mode	Online	Fees for Residential	Fees for Non Residential	Branch	Designed for
26	CP	Enterprise Risk Management (ERM) Level : Middle	21-22 Jul., 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Common	Risk Managers, Risk Analysts and others handling Risk Assessment / Risk Management functions in the Insurance Industry.
27	CP	Leadership Reimagined: Elevating Managerial Excellence in Insurance Level : Middle	29-30 Jul., 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Common	Junior to Middle level Executives in insurance entities, working in the marketing, technical, and Human resources departments.
<b>August, 2025</b>									
28	CP	Cyber Security and Cyber Hygiene for Insurance Industry Level : Basic	5 Aug., 2025	CVT	₹ 1500/- + GST	-	-	Common	Executives of Life & General Insurance companies/ Intermediaries who are exposed to data, technology and/ or have an interest in Cyber Security.
29	CP	Forensic Science in Insurance Investigations Level : Middle	8 Aug., 2025	CVT	₹ 3000/- + GST	-	-	Common	Employees in Fraud cells of the insurance companies, new and experienced investigators engaged by companies, fresh law graduates, ex-servicemen, retired police officers and surveyors.
30	CP	Communication as a Tool for Customer Engagement and Retention Level : Basic	11-12 Aug., 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Life	CRE, CRM personnels of Insurance companies.
31	CP	Risk Based Capital Level : Middle	13 Aug., 2025	CVT	₹ 1500/- + GST	-	-	Common	Senior and middle level insurance executives interested in under-standing the RBC Framework and its implications, Finance and accounting professionals, Risk managers in ERM or related departments.

Sr. No.	CP/ IP	Name of the program	Prgram Date	Prog. Mode	Online	Fees for Residential	Fees for Non Residential	Branch	Designed for
32	CP	Comprehensive Financial Planning : Focus Insurance Planning Level : Middle	14 Aug., 2025	CVT	₹ 1500/- + GST	-	-	Common	Executives working for Insurance Companies, Brokers, Corporate Agents, Specified Persons, Insurance advisors and persons who are interested in financial planning.
33	CP	Program on Financial Markets and ULIPs Level : Middle	18 Aug., 2025	CVT	₹ 1500/- + GST	-	-	Life	Executives working for Insurance Companies, Brokers, Corporate Agents, Specified Persons, Insurance advisors, MF distributors and persons who are interested in selling market linked products.
34	CP	Compliance Management for Principal Officers of Corporate Agents (Including Banks) Level : Advanced	19 Aug., 2025	CVT	₹ 1500/- + GST	-	-	Common	Principal Officers of the Corporate Agents including Banks, the Employees Managing Corporate Agency, Bank tie-ups.
35	CP	Prevention of Sexual Harassment of Women (POSH) Level : Middle	21 Aug., 2025	CVT	₹ 1500/- + GST	-	-	Common	All employees, managers irrespective of genders and officials nominated on the POSH committee from Insurance as well as non-insurance industry – NGO, Law firms and other corporates, MSME.
<b>September, 2025</b>									
36	CP	Transforming Customers into Brand Ambassadors : Strategy for Insurance Level : Basic	8-9 Sept., 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Life	Insurance professionals, Marketing and customer experience, Business leaders.
37	CP	Regulatory Compliance for Insurance Brokers Level : Middle	10 Sept., 2025	CVT	₹ 3000/- + GST	-	-	Common	Senior and Middle level executives and those involved in Regulatory Compliances in the Broking Industry.



Sr. No.	CP/ IP	Name of the program	Prgram Date	Prog. Mode	Online	Fees for Residential	Fees for Non Residential	Branch	Designed for
38	CP	Enterprise Risk Management (ERM) Level : Middle	11-12 Sept., 2025	CVT	₹ 3000/- + GST	-	-	Common	Risk Managers, Risk Analysts and others handling Risk Assessment / Risk Management functions in the Insurance Industry.
39	CP	PPHI Regulations, 2024 and Grievance Resolution Level : Middle	15 Sept., 2025	CVT	₹ 1500/- + GST	-	-	Life	All Officials of frontline, Customer facing functions, Officials working in Policy servicing Customer Relationship Management, Claims functions.
40	CP	Cyber Security, Resilience and Cyber Claims Level : Basic	16 Sept., 2025	CVT	₹ 1500/- + GST	-	-	Common	Executives of life Insurance companies / Intermediaries who have exposure to insurance sector, technology and cyber security.
41	CP	Program on AML, KYC and CFT Requirements Level : Middle	17 Sept., 2025	CVT	₹ 1500/- + GST	-	-	Common	Junior and Middle management executives, Principle Compliance Officers, executives responsible for compliance of AML in Life / General Insurance Companies, Corporate Agents, Brokers and other Intermediaries.
42	CP	Corporate Social Responsibility and Governance for Insurance and other Industries Level : Basic	18-19 Sept., 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Common	Practitioners in insurance, PSUs, Corporate Firms, Organisation and Academician and related areas, working in the Compliance and Human Resources Departments, who are looking for developing CSR policy and its Implementation, Skill set required for building a responsible organisation.
43	CP	Social Media Marketing-Tools and Techniques for Insurers Level : Middle	29 Sept., 2025	CVT	₹ 1500/- + GST	-	-	Common	Practitioners in insurance companies and broking, social media managers and co-ordinators, executives interested in enhancing their knowledge of social media marketing.

Sr. No.	CP/ IP	Name of the program	Prgram Date	Prog. Mode	Online	Fees for Residential	Fees for Non Residential	Branch	Designed for
<b>October, 2025</b>									
44	CP	Policyholders Service and PPHI Regulations Level : Middle	6 Oct., 2025	CVT	₹ 1500/- + GST	-	-	Life	Junior to Middle level Executives working in CRM, Customer facing, frontline positions in Life Insurance Companies, Broker firms, Corporate Agents.
45	CP	Data Security for Insurance Industry Level : Middle	6-7 Oct., 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Common	Practitioners in insurance and related areas, working in the marketing, technical, information technology and data security, and finance department of insurance industry.
46	CP	ULIP Market in India -Trends, Opportunities and Challenges Level : Middle	8 Oct., 2025	CVT	₹ 1500/- + GST	-	-	Life	Insurance professionals, Marketing and sales teams, Product managers, Regulatory and compliance professionals.
47	CP	Enhancing the Productivity of Specified-Authorized Persons of Banks, other Corporate Agents and Brokers for Cas Level : Middle	13 Oct., 2025	CVT	₹ 1500/- + GST	-	-	Common	Specified/Authorized persons of banks, corporate agents and brokers involved in Insurance marketing and Principal Officers/Corporate Insurance Executives in banks, corporate agents, brokers.
48	CP	Ind-AS / IFRS-17 and Accounting Standards for Life Insurance Level : Middle	16 Oct., 2025	CT	-	-	₹ 4000/- + GST	Life	Junior to Middle managerial level executives working in Finance and Accounts, Actuarial and Valuation Department of an Insurance Company.
<b>November, 2025</b>									
49	CP	Compliance Management for Principal Officers of Corporate Agents (Including Banks) Level : Advanced	3 Nov., 2025	CVT	₹ 1500/- + GST	-	-	Common	Principal Officers of the Corporate Agents including Banks, the Employees Managing Corporate Agency, Bank tie-ups.

Sr. No.	CP/ IP	Name of the program	Prgram Date	Prog. Mode	Online	Fees for Residential	Fees for Non Residential	Branch	Designed for
50	CP	Creating High Performers in Bancassurance Channel Level : Middle	4 Nov., 2025	CVT	₹ 1500/- + GST	-	-	Common	Front line sales and marketing executives of Life Insurance companies responsible for Bancassurance Business who manage the Specified Persons from the Banks (B&Ac) of LIC.
51	CP	Comprehensive Financial Planning : Focus Insurance Planning Level : Middle	6 Nov., 2025	CVT	₹ 1500/- + GST	-	-	Common	Executives working for Insurance Companies, Brokers, Corporate Agents, Specified Persons, Insurance advisors.
52	CP	Predictive Analysis for Insurance Industry Level : Middle	6-7 Nov., 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Life	Practitioners and research, claim, product design personnel in insurance, banking, and other related areas, working in finance, actuary and policy departments as managers or head of the department.
53	CP	Certified Insurance Anti Fraud Professional (CIAFP) Level : Advanced	24-26 Nov., 2025	CVT	₹ 7500/- + GST	-	-	Common	Minimum Licentiate from III who have already registered for III's Certified Insurance Anti-Fraud Professional (CIAFP) course.
54	CP	Role of Consumer Protection Machinery (Court) in Insurance Industry Level : Middle	27-28 Nov., 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Common	Insurers, persons in claim settlement department, underwriters, and others who are involved in officer, research and managerial roles of insurance, banks and legal department, corporate lawyers, students of law.
<b>December, 2025</b>									
55	CP	Decoding Consumer Psychology: Mastering the Art of Insurance Sales Level : Middle	2 Dec., 2025	CVT	₹ 1500/- + GST	-	-	Life	Junior and Middle level Executives and officials more specifically those working in Digital Marketing/Direct Marketing/ Conventional Marketing and CRM Department.



Sr. No.	CP/ IP	Name of the program	Prgram Date	Prog. Mode	Online	Fees for Residential	Fees for Non Residential	Branch	Designed for
56	CP	Data Analytics and Data Interpretation Level : Advanced	3-4 Dec., 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Common	Insurance Practitioners who are working and/ or interested in the field of data analytics.
57	CP	PPHI Regulations, 2024 and Grievance Resolution Level : Middle	8 Dec., 2025	CVT	₹ 1500/- + GST	-	-	Life	All Officials of frontline, Customer facing functions, Officials working in Policy servicing Customer Relationship Management, Claims functions.
58	CP	Communication & Presentation Skills for connecting with Millennials and Gen-Z Customers Level : Middle	8-9 Dec., 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Common	Junior to Mid-level executives working in Marketing, Sales, Customer Service and Engagement, Managing Teams and Leadership.
59	CP	Compliance Governance and Risk Management (IRCC) Level : Advanced	17-19 Dec., 2025	CVT	₹ 7500/- + GST	-	-	Common	Associate / Fellow Members of Institute of Company Secretaries of India and Insurance Institute of India registered for the "Compliance Governance and Risk Management in Insurance.
60	CP	Understanding Bond Markets for Insurance Investments Level : Middle	22-23 Dec., 2025	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Common	Executives and officers working in Investment Departments of Insurance Companies and the officers responsible for managing Pension and PF funds and also the executives managing the Investment portfolios in Societies, etc.
<b>January, 2026</b>									
61	CP	ANNUITY Market in India -Trends, Opportunities and Challenges Level : Basic	6 Jan., 2026	CVT	₹ 1500/- + GST	-	-	Life	Insurance professionals, Marketing and sales teams Regulatory and compliance professionals.

Sr. No.	CP/ IP	Name of the program	Prgram Date	Prog. Mode	Online	Fees for Residential	Fees for Non Residential	Branch	Designed for
62	CP	Creating High Performers in Bancassurance Channel Level : Middle	8 Jan., 2026	CVT	₹ 1500/- + GST	-	-	Common	Front line sales and marketing executives of Life Insurance companies responsible for Bancassurance Business who manage the Specified Persons from the Banks (B&Ac) of LIC.
63	CP	Personal Financial Planning : Focus on Insurance Planning Level : Middle	8-9 Jan., 2026	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Life	Executives working for Insurance Companies, Brokers, Corporate Agents, Specified Persons, Insurance advisers.
64	CP	Program on AML, KYC and CFT Requirements Level : Middle	21 Jan., 2026	CVT	₹ 1500/- + GST	-	-	Common	Junior and Middle management executives, Principle Compliance Officers, executives responsible for compliance of AML in Life / General Insurance Companies, Corporate Agents, Brokers and other Intermediaries.
<b>February, 2026</b>									
65	CP	Policyholders Service and Protection of Policyholders Interests for Life Insurance Level : Middle	2-3 Feb., 2026	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Life	Junior to Middle level Executives working in CRM, Customer facing, frontline positions in Life Insurance Companies, Broker firms, Corporate Agents.
66	CP	Cyber Security, Resilience and Cyber Claims Level : Basic	5 Feb., 2026	CVT	₹ 1500/- + GST	-	-	Common	Executives of life Insurance companies/ Intermediaries who have exposure to insurance sector, technology and cyber security.
67	CP	Compliance Management for Principal Officers of Corporate Agents (Including Banks) Level : Middle	9 Feb., 2026	CVT	₹ 1500/- + GST	-	-	Common	Principal Officers of the Corporate Agents including Banks, the Employees Managing Corporate Agency, Bank tie-ups.

Sr. No.	CP/ IP	Name of the program	Prgram Date	Prog. Mode	Online	Fees for Residential	Fees for Non Residential	Branch	Designed for
68	CP	Workshop on Soft Skills for Junior and Mid-level Operations Executives Level : Middle	16-17 Feb., 2026	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Common	Junior to Middle Managers from Sales, marketing, operations, New Team leaders of Life, General and Health Insurance companies and executives from Corporate Agents, Banks as well as Brokers.
69	CP	Forensic Science in Insurance Investigations Level : Middle	19 Feb., 2026	CVT	₹ 3000/- + GST	-	-	Common	Employees in Fraud cells of the insurance companies, new and experienced investigators engaged by companies, fresh law graduates, ex-servicemen, retired police officers and surveyors.
70	CP	Financial Planning : Focus on Retirement Planning Level : Middle	24-25 Feb., 2026	CT	-	₹ 11000/- + GST	₹ 8000/- + GST	Life	Sales Managers, Professional Advisors of Life Insurers, Club Members and Potential MDRTs.



## International Program Calendar

Sr. No.	Code	Name of the program	Program Date	Prog. Mode	Fees for Residential	Branch	Designed for
<b>April 2025</b>							
1	IP	Insurance Regulatory Drawing Board - A Comprehensive Program for Insurance Regulators Level : Middle/Advanced	21-26 Apr., 2025	CT	\$ 600 USD	Common	Senior / middle level officials of Insurance Regulators and Insurance Companies involved in regulations, compliance and similar roles. Senior officials exposed to governmental functions of policy-making.
<b>May, 2025</b>							
2	IP	International Program – Technical Excellence in Life Insurance Level : Middle	19-31 May, 2025	CT	\$ 1300 USD	Life	Executives of the middle management level from various life insurance companies, regulatory bodies as well as those working in broking, corporate agency firms of emerging countries.
<b>June, 2025</b>							
3	IP	Reinsurance Management Program - International Level : Middle	16-21 Jun., 2025	CT	\$ 600 USD	Common	International participants interested in learning reinsurance management.
<b>November, 2025</b>							
4	IP	International Program – Technical Excellence in Life Insurance Level : Middle	17-29 Nov., 2025	CT	\$ 1300 USD	Life	Executives of the middle management level from various life insurance companies, regulatory bodies as well as those working in broking, corporate agency firms of emerging countries.
<b>December, 2025</b>							
5	IP	Reinsurance Program - International Level : Middle	15-20 Dec., 2025	CT	\$ 600 USD	Common	International participants interested in learning reinsurance.

## Program Calendar for 2025-26

## Kolkata Campus

Sr. No.	CP/ IP	Name of the program	Prgram Date	Prog. Mode	Online	Fees for Residential	Fees for Non Residential	Branch	Designed for
<b>May, 2025</b>									
1	CP	Life Insurance Policyholders Service and Protection of Policy Holders Interest	16 May, 2025	CT	-	-	₹ 2500/- + GST	Life	Junior to Middle level Executives working in CRM, Customer facing, frontline positions in Life Insurance Companies, Broker firms, Corporate Agents.
<b>June, 2025</b>									
2	CP	Understanding Consumer Behaviour in Insurance Sales Management	12 Jun., 2025	CVT	₹ 1500/- + GST	-	-	Life	Junior and Middle level Executives and officials more specifically those working in Digital Marketing/ Direct Marketing/ Conventional Marketing and CRM Department.
<b>July 2025</b>									
3	CP	B2B & B2C in Life Insurance Managers	21 Jul., 2025	CT	₹ 1500/- + GST	-	₹ 2500/- + GST	Life	Specified Persons from Corporate agencies, Broking companies sales executives, IMFs, Bancassurance Managers from Banks, Agency Managers from Life Insurance Companies.
<b>August, 2025</b>									
4	CP	Comprehensive Financial Solution for Retirement	19 Aug., 2025	CT	-	-	₹ 2500/- + GST	Common	Marketing executives, HR executives working Insurance Companies and any Individual interested to learn about Pension Products and Retirement Planning.

Sr. No.	CP/ IP	Name of the program	Prgram Date	Prog. Mode	Online	Fees for Residential	Fees for Non Residential	Branch	Designed for
<b>September, 2025</b>									
5	CP	Women in Leadership	10 Sept., 2025	CT	-	-	₹ 2500/- + GST	Common	Both women and men (so that men share the philosophy) in any profession and business. Working women in financial service sector; Students above 18 years are welcome to attend.
6	CP	Handling Customer Grievances, Cases before Ombudsman, Consumer Cases, Mediation and Arbitration	25 Sept., 2025	CT	-	-	₹ 2500/- + GST	Common	Executives from the Insurance Companies, Brokers, Corporate Agents and officials from the Legal Fraternity who would like to under-stand various aspects of customer dispute resolution including Arbitration, Consumer Forum and Ombudsman mechanisms.
<b>October, 2025</b>									
7	CP	Regulatory Changes in Insurance: Impact and Opportunities	29 Oct., 2025	CVT	₹ 1500/- + GST	-	-	Common	Executives and compliance officers of Insurance Companies, Intermediaries.
<b>November, 2025</b>									
8	CP	Communication & Soft Skills for Marketers	4 Nov., 2025	CVT	₹ 1500/- + GST	-	-	Common	Junior to Middle Managers from Sales, marketing, operations, New Team leaders of Life, General and Health Insurance companies and executives from Corporate Agents, Banks as well as Brokers.
9	CP	Work Life Balance(WLB)- Theory, Practice & Outcome	19 Nov., 2025	CT	-	-	₹ 2500/- + GST	Common	Executives from Insurance Companies, Intermediaries, Aviation Companies, and the Owners of Individual Aircrafts.

Sr. No.	CP/ IP	Name of the program	Prgram Date	Prog. Mode	Online	Fees for Residential	Fees for Non Residential	Branch	Designed for
<b>December, 2025</b>									
10	CP	Managerial skills For Life Insurance Managers	8 Dec., 2025	CT	-	-	₹ 2500/- + GST	Life	Junior to Middle level Executives in insurance entities, working in the marketing, technical, and Human resources departments, Newly promoted Team Leaders.
11	CP	Handling Customer Grievances, Cases before Ombudsman, Consumer Cases, Mediation and Arbitration	19 Dec., 2025	CT	-	-	₹ 2500/- + GST	Common	Executives from the Insurance Companies, Brokers, Corporate Agents and officials from the Legal Fraternity who would like to understand various aspects of customer dispute resolution including Arbitration, Consumer Forum and Ombudsman mechanisms.
<b>January, 2026</b>									
12	CP	Comprehensive Financial Planning –Focus Life Insurance Planning	10 Jan., 2026	CT	-	-	₹ 2500/- + GST	Life	Executives working for Insurance Companies, Brokers, Corporate Agents, Specified Persons, Insurance advisers and the persons who are interested in financial planning vis a vis Life Insurance.
13	CP	Enterprise Risk Management (ERM), Key Roles of the Risk Owners and the CRO	13-14 Jan., 2026	CT	-	₹ 10000/- + GST	₹ 5000/- + GST	Common	Executives from Insurance Companies, Investigators and Advocates.
14	CP	Marketing of Insurance Services_New Vistas	18 Jan., 2026	CVT	₹ 1500/- + GST	-	-	Common	Executives from Insurance Companies, Brokers, IMF, TPAs and other professionals from marketing or any otherfield.



Sr. No.	CP/ IP	Name of the program	Prgram Date	Prog. Mode	Online	Fees for Residential	Fees for Non Residential	Branch	Designed for
<b>February, 2026</b>									
15	CP	Workshop on improving Communication & Presentation skills for front line Marketeers	7 Feb., 2026	CVT	₹ 3000/- + GST	-	-	Common	Life Insurance Agents and all those associated in insurance marketing in their various capacities.
16	CP	Financial & Investment Management in Life Offices	20 Feb., 2026	CVT	₹ 3000/- + GST	-	-	Life	Investment managers at junior and middle level working in Investment department/other departments, who may need to know about investment operations in insurance companies.
17	CP	Women in Leadership	24 Feb., 2026	CT	-	-	₹ 2500/- + GST	Common	Both women and men (so that men share the philosophy) in any profession and business. Working women in financial service sector, Students above 18 years are welcome to attend.

## Details of Programs – Mumbai

[CPG- Calendar Program for General Insurance, CPL- Calendar Program for Life Insurance, CPC- Calendar Program for Common, IPG- International Program for General Insurance, IPL- International Program for Life Insurance, IPC- International Program for Common]

### COMMUNICATION AS A TOOL FOR CUSTOMER ENGAGEMENT AND RETENTION

**Program ID – CPL**      **07 Apr, 2025 (CVT)**

**Program ID – CPL**      **11-12 Aug, 2025 (CT)**

#### Key Takeaways from the Program:

- Demonstrate refined communication techniques that drive customer engagement.
- Understand the importance of active listening and empathy in building trust.
- Be equipped to handle complex customer scenarios effectively.
- Leverage modern tools to enhance communication efficiency and impact.

**Participant Profile:** Executives, team leaders, managers of customer service department of Insurance companies.

### ELEVATE YOUR BRAND THROUGH OPERATIONAL EXCELLENCE IN CUSTOMER SERVICE

**Program ID – CPL**      **08 - 09 Apr, 2025 (CT)**

**Key Takeaways from the Program:** The participants of the program will understand and appreciate the following

- **Brand & the Buyer:** What brand means for a customer-How it influences the buyer behavior

- **The Customer Experience-CX:** Who are our customers? What is customer service, The service providers and the customer perceptions, empathizing with the customer, Customer touch points & what are the pain points, the Customer journey, *All is well that ends well-CASE STUDY*
- **Interaction with Customers through tele-calling:** The positives and negatives of a tele-calling. Its limitations. The telephone talking etiquette. Objection handling while on call. *The 3F model-CASE STUDY*
- **Customer Interaction Face to Face:** The duck and mail requests, prioritizing the requests. Listening, *The communication with the customer, The tone-ROLE PLAY*
- **The customer service-the repeat sale:** Customer Experience-improving the persistency & repeat business opportunity
- **The WOW feeling for the customer:** Anchoring of self for a WOW feeling of customer. The TIPS, How the Operational Excellence transforms the customer and build future generation of customers

**Participant Profile:** This program is intended for the operations executives, Managers and senior managers of Life Insurance companies, corporate agents and Broking companies.

### LEGAL & REGULATORY COMPLIANCE IN INSURANCE

**Program ID – CPL**      **15 - 16 Apr, 2025 (CT)**

**Key Takeaways from the Program:** By the end of the program, participants will:

- Gain a comprehensive understanding of the evolving regulatory landscape for insurance companies.
- Learn to design and implement effective compliance frameworks that align with principle-based regulations.

- Enhance their ability to train and empower key compliance personnel within their organizations.
- Master best practices for documentation, ensuring accuracy, compliance, and readiness for audits or inspections.
- Acquire tools and strategies for developing efficient response mechanisms to address compliance issues swiftly and effectively.
- Understand how to foster a culture of compliance within their organizations, strengthening trust and integrity in operations.

**Participant Profile:** Middle level to Senior executives in Legal and Compliance Departments of Insurance Companies.

#### FINANCIAL PLANNING : FOCUS ON TAX PLANNING

**Program ID – CPL**      **17 Apr, 2025 (CVT)**

**Key Takeaways from the Program:** The program participants will have knowledge and insight into the following

- Discuss about provisions of Old and New Tax Regime
- Provisions relating to various deductions under Section 80C to 80U
- Provisions pertaining to exemptions under section 10
- Brief on NRI Taxation and relevant sections
- Updated changes on taxation pertaining to insurance plans
- Case studies to firm up the understanding

**Participant Profile:** Sales Managers, Professional Advisors of Life Insurers, Club Members and Potential MDRTs.

#### CERTIFIED INSURANCE ANTI FRAUD PROFESSIONAL (CIAFP)

**Program ID – CPC**      **21 - 23 Apr, 2025 (CVT)**

**Program ID – CPC**      **24 - 26 Nov, 2025 (CVT)**

**Key Takeaways from the Program:** The Program aims to make the participants understand the following:

- Impact of Insurance Fraud on the industry
- Importance of Special Investigation Units (SIUs) and Fraud Investigations
- Understanding Insurance Fraud in Life, Health, Property, Motor and other contexts
- Importance of Forensic Science in Fraud Investigations
- Regulatory aspects and emerging challenges in Fraud fighting
- Health Frauds: Understanding concerns of Hospitals, Service Providers & Intermediaries
- Understanding Third Party Investigations in different insurance verticals

**Participant Profile:** Eligibility of Candidates): This training is open only for Members of Insurance Institute of India having minimum Licentiate qualification who have already registered for III's Certified Insurance Anti-Fraud Professional (CIAFP) course.

#### INSURANCE REGULATORY DRAWING BOARD - A COMPREHENSIVE PROGRAM FOR INSURANCE REGULATORS

**Program ID – IPC**      **21 - 26 Apr, 2025 (CT)**

**Key Takeaways from the Program:** COI-RDB is designed with the following takeaways for senior officials.

- Appreciate the nation building role of the insurance industry and the role of International Association of Insurance Supervisors (IAIS)

- Learn the logic behind insurance regulations
- Create regulatory ecosystems for a country
- Understand international regulatory practices and the concerns in corporate governance.
- Appreciate salient features of different lines of insurance, such as Life, Health, Marine, Property, Motor, Rural, Micro, Liability, Pension and Reinsurance.
- Understand the challenges in developing the market, protecting policyholders, regulating multiple entities and their operations
- Identify areas where market failures can happen and formulate preventive/ corrective action
- Evolve a regulatory vision/ implementation plan at a country level.

**Participant Profile:** This 6-day program is essentially designed for senior/ middle level officials of Insurance Regulators and Insurance Companies involved in regulations, compliance and similar roles. Senior officials exposed to governmental functions of policy-making, nation-building and development as well as Directors/ Senior Managers of insurance companies, teachers of insurance, compliance officials can join. Domain experts will deliberate on the topics in the context of the IAIS Core Principles and on how regulatory theory is actually applied on the field taking examples from the Indian Regulator and other jurisdictions so that participants can understand how the theory is actually applied on the field.

#### CATASTROPHIC CHALLENGES FOR INSURANCE INDUSTRY

**Program ID – CPC      28 - 29 Apr, 2025 (CT)**

**Key Takeaways from the Program:** The program is designed to provide insights to the participants in the following areas:

- To under the catastrophic challenges in the Asia and in India particular

- How to assess the magnitude of losses created by catastrophic disaster
- How to manage the challenges emerged from climate change to insurance industry
- Aligning themselves with corporate goals of insurance companies and mitigation of risks
- Integrate modern technology for assessment of losses arises of natural disasters
- To learn the use of decision rules for insurance and reinsurance
- How use catastrophic model for estimating future damage and deciding premiums.

**Participant Profile:** Practitioners in insurance and actuary areas, working in the technical, finance, and claims departments of insurance industries, and who are looking at developing effective managerial skills.

#### TRANSFORMING CUSTOMERS INTO BRAND AMBASSADORS : STRATEGY FOR INSURANCE

**Program ID – CPL      06 May, 2025 (CVT)**

**Program ID – CPL      08-09 Sep, 2025 (CT)**

**Key Takeaways from the Program:**

- Insights into the importance of customer advocacy in the insurance industry
- Strategies for delivering exceptional customer experiences and building loyalty
- Techniques for encouraging customer referrals and word-of-mouth marketing
- Best practices for measuring and tracking the impact of customer advocacy

### Participant Profile:

- Insurance professionals: Agents, advisors, brokers and sales teams from life insurance companies.
- Marketing and customer experience teams: Professionals responsible for developing and implementing customer experience and marketing strategies .e.g. Branch Managers, Development Officers.
- Customer service teams: Professionals responsible for delivering customer service and support .e.g. Customer Relationship Executives, HOD (Policy Servicing), HOD (Claims)
- Business leaders: CEOs and other senior executives from insurance companies

### COMPLIANCE GOVERNANCE AND RISK MANAGEMENT (IRCC)

**Program ID – CPC      07 - 09 May, 2025 (CVT)**

**Program ID – CPC      17 - 19 Dec, 2025 (CVT)**

**Key Takeaways from the Program:** The Course covers diverse matters relating to Risk Management, Governance and Compliance in the Insurance industry. This would include:

- Understanding the conceptual framework of insurance regulation
- Becoming aware of the international regulatory scenario
- Knowing statutory provisions contained in various legislations applicable in the country
- Understanding some specific regulations drawn by the Insurance regulator,
- Appreciating the importance of proper market conduct and
- Learning the importance of the compliances required in the insurance sector.

### Participant Profile:

- Associate/ Fellow Members of Institute of Company Secretaries of India and
- Associate/ Fellow Members of Insurance Institute of India

**This classroom training is open only for those who have already registered for the “Compliance Governance and Risk Management in Insurance” [Popularly known as Insurance Regulatory Compliance Course (IRCC)].**

### COMPREHENSIVE TRAINING PROGRAM FOR PRINCIPAL OFFICERS OF THE CORPORATE AGENTS (INCLUDING BANKS)

**Program ID – CPL      07 - 08 May, 2025 (CT)**

**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
- Recent Changes in the Regulatory Framework
- Possible Amendments to the Insurance Act, 1938



**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.

**COMPARATIVE ANALYSIS AND PERFORMANCE OF ULIPS & MUTUAL FUNDS**

**Program ID – CPL      13 - 14 May, 2025 (CT)**

**Key Takeaways from the Program:** The participants of the program will gain knowledge and insight into the following

- Understanding Investment Options
- Risk and Return Management
- Comprehensive Financial Planning
- Regulatory and Tax Implications
- Product Suitability and Comparison
- Market Volatility and Investment Strategies
- Meeting Customer Expectations
- Industry Growth and Opportunities

**Participant Profile:** Executives working for Insurance Companies, Brokers, Corporate Agents, Specified Persons, Insurance advisors, MF distributors and persons who are interested in selling market linked products.

**IMPACTFUL SELLING STRATEGIES**

**Program ID – CPL      13 - 14 May, 2025 (CT)**

**Key Takeaways from the Program:** The participants will get the following:

- Gain a foundational understanding of insurance sales.
- Explore diverse techniques employed in the process of selling insurance.
- Recognize the emotional aspect associated with insurance and its impact on clients.
- Explore the facets of establishing long-term relationships with clients who have purchased insurance.
- Understand the regulatory requirements in insurance sales and post-sale.
- Draw insights from the experiences of accomplished insurance sales professionals.
- Understanding Psyche of the prospect
- Ordinary salesperson vis-a-vis Extra ordinary salesperson
- Winning the hearts of insured
- Insurance Salesperson as ambassador of the insurance companies

**Participant Profile:** Life Insurance Advisors and all those associated in insurance marketing in their various capacities.

**RISK BASED CAPITAL**

**Program ID – CPC      13 May, 2025 (CVT)**

**Program ID – CPC      13 Aug, 2025 (CVT)**

**Key Takeaways from the Program:**

- Overview of RBC Framework
- Importance of RBC in ensuring financial stability

- Components of RBC Framework (Risk categories, Ratios)
- Case studies : RBC Applications in Insurance Companies
- Challenges and limitations of RBC Frame work

**Participant Profile:** The Program is mainly designed for Senior and middle level insurance executives interested in understanding the RBC Framework and its implications, Finance and accounting professionals, Risk managers in ERM or related departments responsible for overseeing the financial stability of insurance companies. It may also be useful for insurance professionals seeking to update their knowledge and skills in various aspects of life insurance business.

#### INTERNATIONAL PROGRAM - TECHNICAL EXCELLENCE IN LIFE INSURANCE

**Program ID – IPL**            **19 - 31 May, 2025 (CT)**

**Program ID – IPL**            **17 - 29 Nov, 2025 (CT)**

**Key Takeaways from the Program:** The participants of the program will acquire the knowledge and appreciation of

- Fundamentals of life insurance in the context of current and emerging trends in the marketplace
- The design and pricing of life insurance products – including profits and capital
- Traditional and Non - traditional Life insurance products - the changing contours of the global life insurance market
- Pensions and Health Insurance - the new dynamics of life insurance markets
- Marketing and distribution of life insurance - in the light of contemporary global practices
- Concepts and skills of Life insurance underwriting

- Life insurance Claims Management and Policy Servicing
- Applications of Information Technology in Life Insurance
- Financial Management of a Life office – basics in contemporary perspective
- Corporate Governance and Legal and Regulatory Compliance
- Risk Management in Life Insurance

**Participant Profile:** Executives of the middle management level from **various life insurance companies, regulatory bodies** as well as those working in **broking, corporate agency firms** of emerging countries.

#### PROGRAM ON AML, KYC AND CFT REQUIREMENTS

**Program ID – CPC**            **27 May, 2025 (CVT)**

**Program ID – CPC**            **17 Sep, 2025 (CVT)**

**Program ID – CPC**            **21 Jan, 2026 (CVT)**

**Key Takeaways from the Program:** The Program aims to provide comprehensive understanding to the participants on the following

- PMLA Act provisions
- The latest Anti-Money Laundering Master Guidelines issued by IRDAI
- Further Circulars on the subject
- KYC Norms
- Provisions relating to Counter Financing Terrorism
- What are the noteworthy changes in the latest guidelines
- Systems and Processes for effective compliance with AML/CFT requirements

**Participant Profile:** Junior and Middle management executives in Insurance companies and Principle Compliance Officers and the

executives responsible for compliance of AML in Life/ General Insurance Companies, Corporate Agents, Brokers and other Intermediaries.

### UNDERSTANDING IFRS 17

**Program ID – CPL      28 May, 2025 (CVT)**

#### Key Takeaways from the Program:

- Features of the standard IFRS 17/IND AS 117 vis-a-vis IFRS 4
- Definition of Insurance Contract
- Features of the present day Insurance Contract.
- Cash flows in an Insurance Contract in the present day products and old products.
- Discuss features about IFRS 9 – Financial Instruments.
- Impact on the Surplus and Balance Sheet of Insurance Company.
- Implementation Path internationally
- Ind AS convergence
- Implementation frame work in India

**Participant Profile:** Junior to Middle managerial level executives working in Finance and Accounts department, Actuarial Department and Valuation Department of an Insurance Company, those interested for self-study.

### RECENT DYNAMICS OF ARBITRATION CLAUSES APPLICABLE TO INSURANCE INDUSTRY

**Program ID – CPC      04 Jun, 2025 (CVT)**

#### Key Takeaways from the Program:

- Overview of The Indian Arbitration and Conciliation Act, 1996 in brief.

- Applicability of specific provisions of The Indian Arbitration act to Insurance policies.
- To discuss the cases of insurance claim in which arbitration act provisions were used.
- To focus on recent new provisions and guidelines brought out by the IRDAI applicable to insurance industry and its legal repercussions.
- Applicability of Arbitration provisions to existing and new insurance policies.

In this context, the College of Insurance has designed this webinar to provide a strong understanding of recent changes made by IRDAI in Arbitration clauses applicable to Insurance industry.

**Participant Profile:** Training would be beneficial to insurers, underwriters, and others who are involved in officer, research and managerial roles. Officers and person concerned of the research and legal department, bank personnel, corporate lawyers, students of law and anyone who is interested.

### PERSONAL FINANCIAL PLANNING : FOCUS ON INSURANCE PLANNING

**Program ID – CPL      05 - 06 Jun, 2025 (CT)**

**Program ID – CPL      08 - 09 Jan, 2026 (CT)**

**Key Takeaways from the Program:** The participants of the program will gain knowledge and insight into the following

- Life cycle needs and personal financial goals
- Personal Risks like early death, disability, morbidity, etc.,
- Risk management and risk management tools.
- Time value of money

- Risks associated with Financial Instruments
- How to make your Personal Financial Planning path risk proof
- Insurance products and Pension Products
- Comprehensive Planning and Monitoring
- Retirement planning

**Participant Profile:** Executives working for Insurance Companies, Brokers, Corporate Agents, Specified Persons, Insurance advisors and persons who are interested in financial planning.

#### INVESTMENT MANAGEMENT IN LIFE INSURANCE COMPANIES

**Program ID – CPL            10 Jun, 2025 (CVT)**

##### **Key Takeaways from the Program:**

- Insurance Investments – basic distinctions : contractual and contingent nature of insurers’ liabilities.; efficient portfolio management in the presence of liabilities ; Investment and Asset Liability Management
- Investment Options : a review of market conditions with respect to various kinds of securities like Bonds, Debentures, Equities, Money market instruments, etc.,
- Investment Management functions : Investment policy, Operations, Monitoring and Accounting

**Participant Profile:** Investment managers at junior and middle level working in Investment department/other departments, who may need to know about investment operations in insurance companies.

#### WORKSHOP ON SOFT SKILLS FOR JUNIOR AND MID-LEVEL OPERATIONS EXECUTIVES

**Program ID – CPC            10-11 Jun, 2025 (CT)**

**Program ID – CPC            16-17 Feb, 2026 (CT)**

**Key Takeaways from the Program:** The participants of the Program would get experience, insights and tools to understand and practice the following

- Communication Skills
- Customer Service and Relationship Management
- Teamwork and Collaboration
- Time Management and Productivity
- Emotional Intelligence
- Professionalism and Workplace Etiquette
- Basic Selling Skills
- Adaptability to Change
- Stress Management
- Presentation Skills

**Participant Profile:** Junior to Mid-level Executives from Sales, marketing, operations of Life, General and Health and Re-Insurance companies and executives from Corporate Agents, Banks as well as Brokers.

#### TERM INSURANCE MARKET IN INDIA -TRENDS, OPPORTUNITIES AND CHALLENGES

**Program ID – CPL            12 Jun, 2025 (CVT)**

**Key Takeaways from the Program:** Upon completion of this 3-hour virtual session, participants will be able to:

- Understand the current landscape of term insurance in India, including market trends, customer preferences, and regulatory requirements.
- Identify and address the challenges of marketing term insurance, such as low awareness, competition, and customer skepticism.
- Leverage opportunities and strategies for successful term insurance marketing, including digital marketing, data-driven insights, and customer-centric approaches.

- Develop effective sales and marketing strategies to promote term insurance products to diverse customer segments.

**Participant Profile:** This virtual session is designed for:

- Insurance professionals: Agents, advisors, and sales teams from life insurance companies.
- Marketing and sales teams: Professionals responsible for promoting and selling term insurance products.
- Product managers: Those involved in designing and developing term insurance products.
- Regulatory and compliance professionals: Individuals responsible for ensuring regulatory compliance in term insurance marketing and sales.

### CUSTOMER SERVICE AND CLAIMS MANAGEMENT

**Program ID – CPL      16 Jun, 2025 (CVT)**

**Key Takeaways from the Program:**

- Importance of Policy Service in Insurance Industry
- Various elements of Policyholders Service Life and General
- Board Policy of Customer Service Policyholders Interest Protection
- Death Claims settlement process
- Settlement of Early Death Claims
- Legal Issues relating to claims
- Impact of early claims on Surplus of an Insurer
- Brand Creation – Role of settlement of Claims

**Participant Profile:** Executives working in Insurance Companies, Broker firms, Specified Persons working in Banks, Corporate agents, etc.

### REINSURANCE MANAGEMENT PROGRAM - INTERNATIONAL

**Program ID – IPC      16-21 Jun, 2025 (CT)**

**Key Takeaways from the Program:** The program is designed to provide a reasonable appreciation of reinsurance from a management perspective, including:

- Theoretical and practical aspects of Reinsurance,
- Reinsurance markets and pools
- Regulations in insurance/ reinsurance, and financial security aspects
- Importance of clauses and documentation
- Considerations in Controlling accumulations, NatCat exposures and fixing retentions
- Designing a reinsurance program
- Concerns in accepting Inward Reinsurance
- Placement of reinsurance in multiple markets, and roles of reinsurance brokers
- Appreciation of ART in risk management decision making process,
- Importance of quantitative techniques and significance of PML in reinsurance
- Appreciation of Modelling in Reinsurance
- Reinsurance Accounting – methods and procedures
- Details of claims procedures,
- Concerns in specialized lines - Aviation, Satellite, Marine Hull, Property, Engineering, Energy, Liability risks, etc.

**Participant Profile:** This program is specially designed to provide international participants an in-depth learning of reinsurance. The focus is on insurance/ reinsurance executives in the senior/ middle management levels who require specific knowledge and skills on



multiple aspects of the reinsurance business, including processes and management of specialized classes or reinsurance business.

### MASTER CIRCULAR ON LIFE INSURANCE PRODUCTS

**Program ID – CPL      24 Jun, 2025 (CVT)**

**Key Takeaways from the Program:** Upon completion of this 3-hour virtual session, participants will be able to:

- Understand the disclosure of product features, benefits and risks clearly.
- Promote fair and transparent sales practices while dealing with customers.
- Reduce instances of misselling and non-disclosure.
- Master a culture of compliance and regulatory adherence within the industry.

**Participant Profile:** This virtual session is designed for:

- Insurance professionals: Agents, advisors, and sales teams from life insurance companies.
- Marketing and sales teams: Professionals responsible for promoting and selling life insurance products.
- Product managers and Bank Assurance Managers: Those involved in marketing and developing life insurance products markets.
- Regulatory and compliance professionals: Individuals responsible for ensuring regulatory compliance in life insurance marketing and sales.

### WORKSHOP ON SYNERGY IN ACTION: MASTERING TEAM DYNAMICS AND BUILDING STRONG INTERPERSONAL CONNECTIONS

**Program ID – CPC      02-03 Jul, 2025 (CT)**

**Key Takeaways from the Program:** Participants of the Workshop would understand and appreciate:

- The long-term priorities of the organization and the need of people to achieve in life
- Concepts of promoting healthy relationships and giving employees a sense of belonging, leading to their motivation and improved performance of the organization
- The importance of building strong interpersonal relationships as a core strategic management practice
- The dynamics of teamwork and the challenges of making people work together
- The Lessons from Case studies of strategies adopted by organizations to build teams

**Participant Profile:** The course is designed for Middle level executives working in Marketing and HR functions in Insurance Companies, Broking, IMFs, as well as Agent Managers. The above topics will be discussed by domain experts in HR from Industry and the academia and the in-house faculty.

### PENSIONS AND RETIREMENT SOLUTIONS

**Program ID – CPL      07 Jul, 2025 (CVT)**

**Key Takeaways from the Program:**

- Various pension plans available in the market and their utility in retirement planning including National Pension Scheme.
- The tax benefits available for contributions to various pension funds.
- The significance of pension planning and pension products vis-à-vis retirement planning.

**Participant Profile:** Marketing executives, HR executives working Insurance Companies and any Individual interested to learn about Pension Products and Retirement Planning.

## CORPORATE GOVERNANCE AND REGULATORY COMPLIANCES IN INSURANCE

**Program ID – CPL**      **08-09 Jul, 2025 (CT)**

### Key Takeaways from the Program:

- Economic environment for Insurers
- Corporate Governance Structure and Norms applicable to Insurers
- Organisational Culture -Importance in Risk Management and Regulatory Compliance
- Legal and Regulatory Framework applicable to Insurers
- Understanding the implications of Principle based Regulatory Framework
- An overview of 2024 Regulations
- Appreciating the impact of transition to IFRS and Risk Based Capital

**Participant Profile:** This Program is designed for Middle and Senior level executives of all Insurance Companies (Life, General, Health ) in Compliance, Senior executives in all functions, Board Secretariat.

## ANNUITY MARKET IN INDIA -TRENDS, OPPORTUNITIES AND CHALLENGES

**Program ID – CPL**      **10 Jul, 2025 (CVT)**

**Program ID – CPL**      **06 Jan, 2026 (CVT)**

### Key Takeaways from the Program:

- Insights into the Indian annuity market and customer preferences
- Strategies for addressing challenges and leveraging opportunities in annuity marketing
- Effective sales and marketing techniques for promoting annuity products

- Best practices for regulatory compliance in annuity marketing and sales

**Participant Profile:** This virtual session is designed for:

- Insurance professionals: Agents, advisors, and sales teams from life insurance companies.
- Marketing and sales teams: Professionals like unit managers, development officers, Branch managers, Product managers who are responsible for promoting and selling annuity products.
- Regulatory and compliance professionals: Individuals responsible for ensuring regulatory compliance in annuity marketing and sales.

## ENTERPRISE RISK MANAGEMENT (ERM)

**Program ID – CPC**      **21-22 Jul, 2025 (CT)**

**Program ID – CPC**      **11-12 Sep, 2025 (CVT)**

**Key Takeaways from the Program:** The program is design to empower participants in the following areas:

- Basic concepts and practices of Enterprise Risk Management (ERM)
- Importance of Risk assessment, Risk reporting
- Regulatory and Compliance risks faced by Insurance Companies
- RBC Framework
- Sec 45 and Claims Risks in Life Insurance
- Risks pertaining to New Business Underwriting & AML
- Investment Risks

**Participant Profile:** Risk Managers, Risk Analysts and others handling risk assessment/ risk management functions in the Insurance Industry, and those who would like to be exposed to such functions may join.

### LEADERSHIP REIMAGINED: ELEVATING MANAGERIAL EXCELLENCE IN INSURANCE

**Program ID – CPC**      **29-30 Jul, 2025 (CT)**

**Key Takeaways from the Program:** The program is designed to provide deeper understanding and insights to the participants in the following areas:

- A comprehensive understanding of modern managerial trends and leadership principles.
- Practical tools to enhance team motivation, communication, and performance.
- Strategies to navigate generational differences and foster a culture of collaboration.
- Insights to lead with confidence, adaptability, and a forward-thinking mindset.

This workshop will serve as a transformational journey for managers to not only meet but exceed the demands of their roles, inspiring trust and driving success within their teams and organizations.

**Participant Profile:** Junior to Middle level Executives in insurance entities, working in the marketing, technical, and Human resources departments, newly promoted Team Leaders.

### CYBER SECURITY AND CYBER HYGIENE FOR INSURANCE INDUSTRY

**Program ID – CPC**      **05 Aug, 2025 (CVT)**

**Key Takeaways from the Program:** The program is designed to empower participants in the following areas:

- Understanding the significance of Cyber threats and related challenges
- Awareness of various kinds of Cyber attacks
- Appreciating the roles of various parties in Cyber Hygiene

- Understanding the basics of Cyber security framework
- Understanding the basics of Cyber insurance policy

**Participant Profile:** The Program is designed for executives of Life & General Insurance companies/ Intermediaries who are exposure to data, technology and/ or have an interest in Cyber Security.

### FORENSIC SCIENCE IN INSURANCE INVESTIGATIONS

**Program ID – CPC**      **08 Aug, 2025 (CVT)**

**Program ID – CPC**      **19 Feb, 2026 (CVT)**

**Key Takeaways from the Program:** The one day virtual training program will enable the participants to understand and appreciate the following

- Role of Forensic science in Insurance Investigations
- How Investigators can use the Forensic Science to arrive at meaningful conclusions
- Use of Forensics in solving Cyber-crimes
- Use of technology and Social Media in Insurance Investigations

Qualified and Experienced Professionals will impart the training with the help of Lectures, Presentations, Case studies and interaction.

**Participant Profile:** The course will be very useful for Employees in Fraud Cells of the Insurance Companies (Life, General and Health), New and experienced Investigators engaged by Companies, Fresh Law Graduates, Ex- Servicemen, Retired Police Officers and Surveyors as also anyone who has passed minimum XII Standard and has a flair for investigation

### COMPREHENSIVE FINANCIAL PLANNING : FOCUS INSURANCE PLANNING

**Program ID – CPC**      **14 Aug, 2025 (CVT)**

**Program ID – CPC**      **06 Nov, 2025 (CVT)**

**Key Takeaways from the Program:** The participants of the program will gain knowledge and insight into the following

- Life cycle needs and personal financial goals
- Personal Risks like early death, disability, morbidity, etc.,
- Risk management and risk management tools.
- Time value of money
- Risks associated with Financial Instruments
- How to make your Personal Financial Planning path risk proof
- Insurance products and Pension Products
- Comprehensive Planning and Monitoring
- Retirement planning

**Participant Profile:** Executives working for Insurance Companies, Brokers, Corporate Agents, Specified Persons, Insurance advisors and persons who are interested in financial planning.

#### PROGRAM ON FINANCIAL MARKETS AND ULIPS

**Program ID – CPL**      **18 Aug, 2025 (CVT)**

**Key Takeaways from the Program:** The participants of the program will gain knowledge and insight into the following

- Understanding Investment Options
- Risk and Return Management
- Financial Planning
- Regulatory and Tax Implications
- Product Suitability and Recommendation
- Benefit Illustration
- Fund Switches

**Participant Profile:** Executives working for Insurance Companies, Brokers, Corporate Agents, Specified Persons, Insurance advisors, MF distributors and persons who are interested in selling market linked products.

#### COMPLIANCE MANAGEMENT FOR PRINCIPAL OFFICERS OF CORPORATE AGENTS (INCLUDING BANKS)

**Program ID – CPC**      **19 Aug, 2025 (CVT)**

**Program ID – CPC**      **03 Nov, 2025 (CVT)**

**Program ID – CPC**      **09 Feb, 2025 (CVT)**

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

- Conditions of grant of registration of corporate Agents
- 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
- Recent Changes in the Regulatory Framework
- Possible Amendments to the Insurance Act, 1938

**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

#### PREVENTION OF SEXUAL HARASSMENT OF WOMEN

**Program ID – CPC**      **21 Aug, 2025 (CVT)**

**Key Takeaways from the Program:** The purpose of the program is to create awareness amongst all the employees and to sensitize management towards gender equality as well train POSH internal committee members on how to handle the grievances.

**Participant Profile:** All employees, managers irrespective of genders and officials nominated on the POSH committee from Insurance as well as non-insurance industry – NGO, Law firms and other corporates, MSME.

#### REGULATORY COMPLIANCE FOR INSURANCE BROKERS

**Program ID – CPC**      **10 Sep, 2025 (CVT)**

**Key Takeaways from the Program:** COI-RCB two days virtual training program covers the following:

- Appreciate the purpose of regulatory compliances in the insurance industry
- Overview of new regulatory framework and understanding best practices
- Identify areas where failures can happen in a Broking Company
- Create appropriate systems and processes within the company to prevent violations.
- Importance of Regulations at Entity levels–Focus: Brokers and other Distribution Channels
- Importance of Regulations at Operations level

Domain experts will discuss the above topics in the context of recent Regulations issued by the Indian Regulator and International Regulatory Principles.

**Participant Profile:** This Program is designed for Senior and Middle level executives and those involved in Regulatory Compliances in the Broking Industry and those involved in marketing, also those aspiring to take up the higher responsibilities within broking companies.

#### PPHI REGULATIONS, 2024 AND GRIEVANCE RESOLUTION

**Program ID – CPL**      **15 Sep, 2025 (CVT)**

**Program ID – CPL**      **08 Dec, 2025 (CVT)**

**Key Takeaways from the Program:** The participants of the program will be gaining the knowledge of following with the program

- Important causes of Consumer Grievances in Insurance Industry
- Legal and Regulatory Framework
- Treating Customers Fairly (TCF) Principle
- Effective consumer grievance redressal adhering to Regulatory Turnaround times
- Use of Empathetic Communication Skills and Emotional Intelligence
- Root Cause Analysis and System Correction
- Industry Best Practices Grievance Management

**Participant Profile:** All Officials of frontline, Customer facing functions, Officials working in Policy servicing Customer Relationship Management, Claims functions.

#### CYBER SECURITY, RESILIENCE AND CYBER CLAIMS

**Program ID – CPC**      **16 Sep, 2025 (CVT)**

**Program ID – CPC**      **05 Feb, 2026 (CVT)**

**Key Takeaways from the Program:** The program is designed to empower participants in the following areas:

- Understanding the significance of Cyber threats and related challenges



- Awareness of various kinds of Cyber attacks
- Appreciating the roles of various parties in Cyber Resilience
- Understanding the basics of Cyber security framework
- Understanding the basics of Cyber insurance policy

**Participant Profile:** The Program is designed for executives of Life and General Insurance companies/ Intermediaries who have exposure to the insurance sector and have an interest in technology or cyber security.

### CORPORATE SOCIAL RESPONSIBILITY AND GOVERNANCE FOR INSURANCE AND OTHER INDUSTRIES

**Program ID – CPC      18-19 Sep, 2025 (CT)**

**Key Takeaways from the Program:** The program is designed to provide insights to the participants in the following areas:

- To learn the importance of CSR and provisions in the Act and Rules (Companies Act 2013 and CSR Rules 2014).
- To understand and learn experience of international practice and guidelines relating to CSR.
- To know the CSR implementation process and challenges while implementing it.
- To explore the CSR activities suitable for the organisation.
- To learn how to develop CSR policy, planning of CSR policy and its monitoring and reporting in the annual reports of the company and government department.
- To understand the practice of new governance and accountability.

**Participant Profile:** Practitioners in insurance, PSUs, corporate firms, organisation and academician and related areas, working in the compliance and human resources departments, who are looking for developing CSR policy and its implementation, skill set required for building a responsible organisation.

### SOCIAL MEDIA MARKETING-TOOLS AND TECHNIQUES FOR INSURERS

**Program ID – CPC      29 Sep, 2025 (CVT)**

**Key Takeaways from the Program:** This program is designed to help the participants:

- Learn the basics of Social Media Marketing and Mass Media Marketing
- Appreciate the tools employed in Social Media Management
- Recognize the importance of Social Media Tools and their optimization
- Appreciate the issues and challenges while marketing on the Social Media Platforms
- Understand Compliance and Risk Management related considerations in Social Media Marketing

**Participant Profile:** Practitioners in insurance companies and broking, social media managers and co-ordinators, legal and compliance professionals, as well as executives interested in enhancing their knowledge of social media marketing.

### POLICYHOLDERS SERVICE AND PPHI REGULATIONS

**Program ID – CPL      06 Oct, 2025 (CVT)**

**Key Takeaways from the Program:** The participants of the Program will gain the knowledge and insights into

#### Customer service

- Do we know our Customers?
- Understanding Millennial and Gen Z Customers
- Making Customer touchpoints delightful – Adding value
- Dealing with difficult Customers

- Moments of Truth-Trust Equation- Sensitivity at Claim stage
- Grievance handling
- Best Practices in Customer Experience

**Policyholder protection:**

- Steps Taken by IRDAI to Safeguard the Interests of Policyholders
- All the important provisions of IRDAI Protection of Policyholders' Interest Regulations 2024

**Participant Profile:** Junior to Middle level Executives working in CRM, Customer facing, frontline positions in Life Insurance Companies, Broker firms, Corporate Agents.

**DATA SECURITY FOR INSURANCE INDUSTRY**

**Program ID – CPC          06- 07 Oct, 2025 (CT)**

**Key Takeaways from the Program:** The program is designed to provide insights to the participants in the following areas:

- To overview the draft of Personal Data Protection Bill of 2019 (PDP Bill).
- To understand role Insur-Tech companies in big data storage and security, machine learning, internet of things, cloud computing, and distributed ledger technologies.
- To give exposure to alternative data.
- To make aware about potential risk of increased data sharing, unauthorised access to and use or transfer of such information to a wide variety of regulated and unregulated entities.
- To give exposure to the insurance-customer centric privacy principle of data protections.

**Participant Profile:** Practitioners in insurance and related areas, working in the marketing, technical, information technology and data security, and finance department of insurance industry.

**ULIP MARKET IN INDIA -TRENDS, OPPORTUNITIES AND CHALLENGES**

**Program ID – CPL          08 Oct, 2025 (CVT)**

**Key Takeaways from the Program:** Upon completion of this 3-hour virtual session, participants will be able to:

- Understand the current landscape of ULIPs in India, including regulatory frameworks, market trends, and customer preferences.
- Identify and address the challenges of marketing ULIPs, such as product complexity, competition, and customer skepticism.
- Leverage opportunities and strategies for successful ULIP marketing, including digital marketing, data-driven insights, and customer-centric approaches.
- Develop effective sales and marketing strategies to promote ULIPs to diverse customer segments.

**Participant Profile:**

- Insurance professionals: Agents, advisors, unit managers, and dev. officers from life insurance companies.
- Marketing and sales teams: Professionals responsible for promoting and selling ULIPs.
- Product managers: Those involved in understanding and developing ULIP markets.
- Regulatory and compliance professionals: Individuals responsible for ensuring regulatory compliance in ULIP marketing and sales. By attending this virtual session, participants will gain valuable insights and practical knowledge to enhance their ULIP marketing and sales efforts in India.

### ENHANCING THE PRODUCTIVITY OF SPECIFIED-AUTHORIZED PERSONS OF BANKS, OTHER CORPORATE AGENTS AND BROKERS FOR CAS

**Program ID – CPC**      **13 Oct, 2025 (CVT)**

#### Key Takeaways from the Program:

- 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

**Participant 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.

### IND-AS / IFRS-17 AND ACCOUNTING STANDARDS FOR LIFE INSURANCE

**Program ID – CPL**      **16 Oct, 2025 (CT)**

#### Key Takeaways from the Program:

- Features of the standard IFRS 17/IND AS 117 vis-a-vis IFRS 4
- Definition of Insurance Contract
- Features of the present day Insurance Contract.
- Cash flows in an Insurance Contract in the present day products and old products.
- Discuss features about IFRS 9 – Financial Instruments.
- Impact on the Surplus and Balance Sheet of Insurance Company.

- Implementation Path internationally
- Ind AS convergence
- Implementation frame work in India

**Participant Profile:** Junior to Middle managerial level executives working in Finance and Accounts department, Actuarial Department and Valuation Department of an Insurance Company, those interested for self-study.

### CREATING HIGH PERFORMERS IN BANCASSURANCE CHANNEL

**Program ID – CPC**      **04 Nov, 2025 (CVT)**

**Program ID – CPC**      **08 Jan, 2026 (CVT)**

**Key Takeaways from the Program:** The participants of the Program will get the knowledge, and appreciation of the following

- The Need for Banks to sell Insurance Products-Perspectives of Banks & Customers
- Core Distinctions, Issues and challenges of Bancassurance business.
- The leadership role of a Bancassurance Manager today.
- Enhancing Productivity of Specified Personas to achieve higher performance levels.
- Creating Win-win Situation for the Banker and the Insurer
- Ensuring Regulatory Compliance

**Participant Profile:** Front-line sales and marketing executives of Life and Non-Life Insurance companies responsible for Bancassurance business targets who manage the Specified Persons from the Banks.

### PREDICTIVE ANALYSIS FOR INSURANCE INDUSTRY

**Program ID – CPL      06-07 Nov, 2025 (CT)**

**Key Takeaways from the Program:** The program is designed to provide insights to the participants in the following areas:

- To understand the importance and use of predictive analysis.
- To learn how to use the data of for predictive analysis.
- To understand a procedure of building model and selecting appropriate variables for prediction.
- To practice predictive analysis for forecasting the future trends in insurance industry.
- To discuss some case studies relating to use of predictive analysis.

**Participant Profile:** Practitioners and research, claim, product design personnel in insurance, banking, and other related areas, working in finance, actuary and policy departments as managers or head of the department.

### ROLE OF CONSUMER PROTECTION MACHINERY (COURT) IN INSURANCE INDUSTRY

**Program ID – CPC      27-28 Nov, 2025 (CT)**

**Key Takeaways from the Program:**

- Overview of The Indian Consumer Protection Act, 2019 and Consumer Protection Act of 1986.
- To make discussion on the wording in the insurance contract and its implications.
- To facilitate stakeholder consultation on insurance cases in consumer commissions.
- To narrate some case laws pertaining to insurance and financial services.

- To understand the role of insurance employees in settling the claims.
- To overview the role of Ombudsman as supporting to insurance claim settlement procedures.

**Participant Profile:** Training would be beneficial to insurers, persons in claim settlement department, underwriters, and others who are involved in officer, research and managerial roles of insurance, banks and legal department, corporate lawyers, students of law and anyone who is interested.

### DECODING CONSUMER PSYCHOLOGY: MASTERING THE ART OF INSURANCE SALES

**Program ID – CPL      02 Dec, 2025 (CVT)**

**Key Takeaways from the Program:**

- Emerging Market Trends and shifts in consumer behavior
- Social Media Marketing and its role in influencing consumer decisions and strategies for effective social media marketing
- Use of Big Data in Personalized Marketing and how big data analytics can be leveraged to tailor marketing strategies, ensuring a personalized approach that resonates with individual consumer needs
- Customer-Centric Approach and focusing on meeting their unique needs and expectations for long-term relationships and loyalty.

**Participant Profile:** Junior and Middle level Executives and officials more specifically those working in Digital Marketing/Direct Marketing/ Conventional Marketing and CRM Department.

**DATA ANALYTICS AND DATA INTERPRETATION****Program ID – CPC      03-04 Dec, 2025 (CT)**

**Key Takeaways from the Program:** This program is designed to provide insights to help participants in the following areas of work:

- Data Visualization - to become internal thinkers of the enterprise who can visualize the corporate objectives of collecting data. They would be able to identify and appreciate various convergences – ranging from the organization's vision, operational goals, market realities, and touch-points for engaging consumers as well as marketing and service level strategies and identify the bits of data that would serve the purposes best.
- Identifying and Defining Data Elements - to realize the importance of building clean databases comprising accurate and analysable data elements.
- Conforming to Standards - to appreciate why databases need to confirm to international quality standards relating to data security, professional and regulatory protocols.
- Appreciating Technology - to appreciate the importance of analytics, strategy formulation, predictive modelling and anomaly detection algorithms, etc.

**Participant Profile:** The program is designed for serious minded insurance practitioners who are working and/ or interested in the field of data analytics.

**COMMUNICATION & PRESENTATION SKILLS FOR CONNECTING WITH MILLENNIALS AND GEN-Z CUSTOMERS****Program ID – CPC      08-09 Dec, 2025 (CT)**

**Key Takeaways from the Program:**

- Tailor their communication strategies to align with the expectations of younger generations.

- Create impactful presentations that leave a lasting impression.
- Build stronger connections with Millennials and Gen-Z, enhancing customer satisfaction and loyalty.
- Improve their confidence and professionalism in customer interactions.

**Participant Profile:** Junior to Mid-level executives working in Marketing, Sales, Customer Service and Engagement, Managing Teams and Leadership.

**REINSURANCE PROGRAM - INTERNATIONAL****Program ID – IPC      15-20 Dec, 2025 (CT)**

**Key Takeaways from the Program:** The program is designed to provide a reasonable appreciation of reinsurance including:

- Theoretical and practical aspects of Reinsurance,
- Reinsurance markets and pools,
- Regulations in insurance/ reinsurance,
- Considerations in fixing retentions,
- Designing a reinsurance program,
- Reinsurance and financial security,
- Placement of reinsurance in multiple markets,
- Controlling accumulations and NatCat exposures,
- Appreciation of ART mechanisms
- Appreciation of Modelling in Reinsurance

**Participant Profile:** This program is designed for international participants interested in learning reinsurance as an exclusive training package of 6 days, inclusive of a day for seeing the historic city of Mumbai.



## UNDERSTANDING BOND MARKETS FOR INSURANCE INVESTMENTS

**Program ID – CPC 22-23 Dec, 2025 (CT)**

### Key Takeaways from the Program:

- To update the conceptual knowledge and skills of the diverse participants to a desired base level in Bond and Debt Markets
- To demonstrate the linkage between concepts and application with skill-based exercises and cases
- To familiarize the participants with investment and trading strategies in bonds
- Learning Outcomes: at the end of this programme, the participants will be able to:
- To spot anomalies between intrinsic values and prices
- To read and analyse trends in yields based on macroeconomic events and utilize Bloomberg and other news feeds
- To identify opportunities to engage in contrarian trades on the sell and buy side

### Participant Profile:

- Topics relating Bond Markets and Bond trading – Bond trading strategies.
- Sessions will be conducted in interactive mode, aided by presentation material, practical examples.

## POLICYHOLDERS SERVICE AND PROTECTION OF POLICYHOLDERS INTERESTS FOR LIFE INSURANCE

**Program ID – CPL 02-03 Feb, 2026 (CT)**

**Key Takeaways from the Program:** The participants of the Program will gain the knowledge and insights into

### Customer service

- The ten customer service skills
- Acquiring professionalism in customer service
- The customer service management
- Achieving excellence in Customer service
- Dealing with challenging customers
- To make your company the most recommended one by your customers
- Customer satisfaction and loyalty: Strategies and Measurement

### Policyholder protection:

- Steps Taken by IRDAI to Safeguard the Interests of Policyholders
- All the important provisions of IRDAI Protection of Policyholders' Interest Regulations 2024

**Participant Profile:** Junior to Middle level Executives working in CRM, Customer facing, frontline positions in Life Insurance Companies, Broker firms, Corporate Agents.

## FINANCIAL PLANNING : FOCUS ON RETIREMENT PLANNING

**Program ID – CPL 24-25 Feb, 2026 (CT)**

**Key Takeaways from the Program:** The program participants will have knowledge and insight into the following

- Present Value / Future Value / Inflation Adjusted Rate of Return/Perpetual Annuity
- Retirement Planning
- Pension/Annuity Plans
- Immediate and Deferred Annuity Plans
- Types of Annuity Options
- Actuarial aspects relating to Pension Schemes

**Participant Profile:** Sales Managers, Professional Advisors of Life Insurers, Club Members and Potential MDRTs.

## Details of Programs – Kolkata

### LIFE INSURANCE POLICYHOLDERS SERVICE AND PROTECTION OF POLICYHOLDERS INTEREST

**Program ID – CPL**      **16 May, 2025 (CT)**

**Key Takeaways from the Program:** The participants of the Program will gain the knowledge and insights into

#### Customer service

- The ten customer service skills
- Acquiring professionalism in customer service
- The customer service management
- Achieving excellence in Customer service
- Dealing with challenging customers
- To make your company the most recommended one by your customers
- Customer satisfaction and loyalty: Strategies and Measurement

#### Policyholder protection:

- Steps Taken by IRDAI to Safeguard the Interests of Policyholders
- All the important provisions of IRDAI Protection of Policyholders Interest Regulations 2017

**Participant Profile:** Junior to Middle level Executives working in CRM, Customer facing, frontline positions in Life Insurance Companies, Broker firms, Corporate Agents.

### UNDERSTANDING CONSUMER BEHAVIOUR IN INSURANCE SALES MANAGEMENT

**Program ID – CPL**      **21 Jun, 2025 (CVT)**

#### Key Takeaways from the Program:

- Emerging Market Trends and shifts in consumer behavior
- Social Media Marketing and its role in influencing consumer decisions and strategies for effective social media marketing
- Use of Big Data in Personalized Marketing and how big data analytics can be leveraged to tailor marketing strategies, ensuring a personalized approach that resonates with individual consumer needs
- Customer-Centric Approach and focusing on meeting their unique needs and expectations for long-term relationships and loyalty.

**Participant Profile:** Junior and Middle level Executives and officials more specifically those working in Digital Marketing/ Direct Marketing/ Conventional Marketing and CRM Department.

### B2B & B2C FOR LIFE INSURANCE MANAGERS

**Program ID – CPL**      **21 Jul, 2025 (CT)**

**Key Takeaways from the Program:** The participants of the program on Business Insurance will gain the knowledge and insight into-

- Key Man Insurance, its benefits, the soliciting process, the tax Implications.
- Partnership Insurance-process and tax implications.
- Employer-Employee Insurance: Different types of E-E insurance, its benefits, the tax Implications for the employer and the employee.

- Married Women's property Act (MWP) - Life Insurance business solicitation with regard to MWP Act -The benefits and various scenarios of MWP Act.
- Worksite marketing, the leverage and the benefits.

**Participant Profile:** Specified Persons from Corporate agencies, Broking companies sales executives, IMFs, Bancassurance Managers from Banks, Agency Managers from Life Insurance Companies.

#### COMPREHENSIVE FINANCIAL SOLUTION FOR RETIREMENT

**Program ID – CPC**      **19 Aug, 2025 (CT)**

##### Key Takeaways from the Program:

- Personal Financial Planning
- Retirement Planning
- Pension/Annuity Plans
- Immediate and Deferred Annuity Plans
- Types of Annuity Options
- Actuarial aspects relating to Pension Schemes
- Ulips & SWPS

**Participant Profile:** Marketing executives, HR executives working Insurance Companies and any Individual interested to learn about Pension Products and Retirement Planning.

#### WORK LIFE BALANCE (WLB) - THEORY, PRACTICE & OUTCOME

**Program ID – CPC**      **28 Aug, 2025 (CT)**

**Program ID – CPC**      **19 Nov, 2025 (CT)**

##### Key Takeaways from the Program:

There is no perfect, one size fits all, balance one should strive for in WLB. The best work-life balance is different because of different priorities and lives that everyone has. It does not mean an equal

balance. It may vary over time though. Various researches have shown that Achievement and Enjoyment are the two most important aspects of Work-Life Balance. It means pride, satisfaction, happiness, celebration, love, a sense of wellbeing etc. Therefore, according to many, another good definition for Work Life Balance would be, "Meaningful daily Achievement and Enjoyment in Work, Family, Friends and Self" & the participants will be endowed with the practical & theoretical stand points to make WLB a success – both for the organisation & personal development.

**Participant Profile:** Practising HR professionals, individuals, even CEOs, Union representatives should join the Session.

#### WOMEN IN LEADERSHIP

**Program ID – CPC**      **10 Sep, 2025 (CT)**

**Program ID – CPC**      **24 Feb, 2026 (CT)**

**Key Takeaways from the Program:** The Program is of one day duration. It aims at making the participants aware of:

- Awakening positivity in the inner core instincts of women
- The inspirations and motivations, that make women scale greater heights
- How the society and the environment needs to change
- Developing self-confidence
- Acquiring knowledge and skill sets in focused areas, to deliver better results
- Governmental facilities and support available to the women
- Legal provisions in favour of women
- The need for more regulations for women to have more freedom and self-reliance
- Women leadership in working together with males

**Participant Profile:** The Program is designed for both women and men (so that men share the philosophy) in any profession and business. Working women in financial service sector, Students above 18 years are welcome to attend.

#### HANDLING CUSTOMER GRIEVANCES, CASES BEFORE OMBUDSMAN, CONSUMER CASES, MEDIATION AND ARBITRATION

**Program ID – CPC**      **25 Sep, 2025 (CT)**

**Program ID – CPC**      **19 Dec, 2025 (CT)**

**Key Takeaways from the Program:** The program is designed to provide the following:

- Awareness about Consumer Rights
- Knowledge to handle grievances effectively
- Understanding different types of Customer Grievances and their causes
- Understanding various dispute resolution mechanisms and functioning of the Insurance Ombudsman
- Awareness of Alternative Dispute Resolution methods in the insurance industry - Focus on Arbitration

**Participant Profiles:** The Program is designed for executives from the Insurance Companies, Brokers, Corporate Agents and officials from the Legal Fraternity who would like to understand various aspects of customer dispute resolution including Arbitration, Consumer Forum and Ombudsman mechanisms.

#### REGULATORY CHANGES IN INSURANCE: IMPACT AND OPPORTUNITIES

**Program ID – CPC**      **29 Oct, 2025 (CVT)**

**Key Takeaways from the Program:** It aims at making the participants aware of–

- The recent regulatory changes
- Current/previous state and the position post changes
- Impact of the regulatory changes on the insurance carriers, intermediaries and the customers
- How does the market react to such changes
- Forth coming changes, expected, to remain geared up

**Participant Profile :** The Program is designed for the Executives and compliance officers of Insurance Companies, Intermediaries.

#### COMMUNICATION & SOFT SKILLS FOR MARKETERS

**Program ID – CPC**      **04 Nov, 2025 (CVT)**

**Key Takeaways from the Program:** The participants of the Program would get experience, insights and tools to understand and practice the following

- Communication
- Interpersonal Relationships through Self Awareness
- Work Ethic & Team Work
- Time Management
- Analytical and Critical thinking
- Emotional intelligence
- Conflict management
- Leadership

**Participant Profile:** Junior to Middle Managers from Sales, marketing, operations, New Team leaders of Life, General and Health Insurance companies and executives from Corporate Agents, Banks as well as Brokers.

### MANAGERIAL SKILLS FOR LIFE INSURANCE MANAGERS

**Program ID – CPL**      **08 Dec, 2025 (CT)**

#### Key Takeaways from the Program:

- Relearning management concepts relevant for the present day and for Insurance Sector
- Aligning themselves with Corporate goals and communicating these goals to the team
- Understanding the concept and Implementation of Change Management
- Understanding Leadership skills and Effective Delegation
- Navigating changes due to technology and leveraging it
- Conflict Management
- Personal values, ethics and Integrity
- Organisation Culture of Compliance

**Participant Profile:** Junior to Middle level Executives in insurance entities, working in the marketing, technical, and human resources departments, newly promoted team leaders.

### COMPREHENSIVE FINANCIAL PLANNING - FOCUS L IFE INSURANCE PLANNING

**Program ID – CPL**      **10 Jan, 2025 (CT)**

**Key Takeaways from the Program:** The participants of the program will gain knowledge and insight into the following

- Life cycle needs and personal financial goals
- Personal Risks like Early Death, Disability, Morbidity, etc.,

- Risk Management and Risk Management Methods.
- Time value of money
- Risks associated with Financial Instruments
- How to make your Personal Financial Planning path risk proof
- Insurance products and Pension Products
- Comprehensive Planning and Monitoring
- Retirement planning

**Participant Profile:** Executives working for Insurance Companies, Brokers, Corporate Agents, Specified Persons, Insurance advisers and the persons who are interested in financial planning vis a vis Life Insurance.

### ENTERPRISE RISK MANAGEMENT (ERM), KEY ROLES OF THE RISK OWNERS AND THE CRO

**Program ID – CPC**      **13-14 Jan, 2026 (CT)**

**Key Takeaways from the Program:** The Program is of two days duration. It aims at making the participants aware of-

- Preparing the Risk Management Policy for the organization.
- Setting up of an ERM framework to manage the risk and to meet the compliance requirements as well.
- Identifying the risk factors and to set up an inventory of risk.
- Prioritizing the risk items and analyzing them.
- Choosing options on business, based on the risk appetite.
- Scanning on the physical risk factors and to address them.
- Examining the financial risk factors and the Risk Based Capital requirements.
- Preparing the annual Own Risk and Solvency Assessment (ORSA) report.



- Strengthening the financial and reputational position of the company.
- Leading role of the CRO and Risk Managers/ Risk Owners.

**Participant Profile:** The Program is designed for Executives from Insurance Companies, Investigators and Advocates.

### MARKETING OF INSURANCE SERVICES NEW VISTAS

**Program ID – CPC**      **18 Jan, 2026 (CVT)**

**Key Takeaways from the Program:** The program aims at making the participants unlearn and relearn:

- On all pervasive concept of marketing with a sense to practice
- On the marketing strategy
- On the branding strategy
- On Product and service innovations
- On making the competition irrelevant, creating a situation of an uncontested market Sounds magical but doable!

**Participant Profile:** The Program is designed for Executives from Insurance Companies, Brokers, IMF, TPAs and other professionals from marketing or any other field.

### WORKSHOP ON IMPROVING COMMUNICATION & PRESENTATION SKILLS FOR FRONT LINE MARKETEERS

**Program ID – CPC**      **07 Feb, 2026 (CVT)**

**Key Takeaways from the Program:**

- To learn the basics of insurance selling.
- To learn about the different techniques of insurance selling.
- To understand as to how insurance is close to emotions.
- To learn about the art of patience in insurance selling till the sale finally materializes.

- To learn about various aspects of long term bondage with the one to whom insurance is finally sold.
- To understand various regulations with regard to insurance selling and their rights even after insurance is sold.
- To benefit from experiences of successful insurance salesperson.

**Participant Profile:** Life Insurance Agents and all those associated in insurance marketing in their various capacities.

### FINANCIAL & INVESTMENT MANAGEMENT IN LIFE OFFICES

**Program ID – CPL**      **20 Feb, 2026 (CVT)**

**Key Takeaways from the Program:** The participants of the program would gain the knowledge and insight into the following

- Financial Management of Life Office, Budgeting and Budget Control
- Insurance Investments - basic distinctions - contractual and contingent nature of insurers liabilities and their need to manage capital value and income risks, Canons of Investment - matching and immunisation and other perspectives [from actuarial literature], efficient portfolio management in the presence of liabilities, Investment and Asset Liability Management
- Regulations relating to Investments of Insurers, Capital Markets - the norms and their implications - a comprehensive review
- Investment Options - a review of market conditions with respect to various kinds of securities like Bonds, Debentures, Equities, Money market instruments, etc.,
- Investment Management functions - Investment policy, Operations, Monitoring and Accounting, Portfolio Management, Asset allocation, Technical Appraisal, Accounting-Valuation of Investments

**Participant Profile:** Investment managers at junior and middle level working in Investment department/other departments, who may need to know about investment operations in insurance companies.

## Certificate Courses offered by College of Insurance

### ➤ CC1 - CERTIFICATE COURSE IN LIFE INSURANCE MARKETING

#### Course Structure -

Particulars	Details
Duration of the course	4 months
Mode of Teaching	Self-study + 3 days Online Contact Classes
Total hours of Teaching	18 hours for Online Contact Classes (to solve queries)
Exam pattern	MCQ pattern + Assignments
Target Group	Graduate / Post Graduate, Freshers as well as employees working in Insurance Companies
Fees for the course	₹5900/- ( ₹5000/- + 18% GST)

### ➤ CC2 - ADVANCED CERTIFICATE COURSE IN HEALTH INSURANCE

#### Course Structure -

Particulars	Details
Duration of the course	4 months (3 hours on weekends)
Mode of Teaching	Virtual Training
Total hours of Teaching	90 hours
Exam pattern	MCQ pattern
Target Group	Graduate / Post Graduate, Freshers as well as employees working in Insurance Companies
Fees for the course	₹ 11,800/- ( ₹ 10,000/- + 18% GST)

➤ **CC3 - CERTIFICATE COURSE IN GENERAL INSURANCE**

**Course Structure -**

Particulars	Details
Duration of the course	3 months (on weekends – Saturday and Sunday)
Mode of Teaching	Virtual Training from COI, Kolkata
Total hours of Teaching	100 hours
Exam pattern	MCQ pattern
Target Group	Fresh graduates/Post Graduates, Broking Companies, Insurance Companies, Freelancers
Fees for the course	₹ 14,160 /- ( ₹ 12,000/- + 18% GST for Virtual training)

➤ **CC4 - CERTIFICATE COURSE IN INVESTIGATION AND FRAUD DETECTION IN LIFE INSURANCE**

**Course Structure -**

Particulars	Details
Duration of the course	3 Days
Mode of Teaching	Virtual Training sessions
Total hours of Teaching	15 hours for online classes
Exam pattern	MCQ pattern
Target Group	Employees working in Fraud cells/ Claims Department/ Audit functions of the company
Fees for the course	₹ 10620/- ( ₹ 9,000/- + 18 % GST)

➤ **CC5 - CERTIFICATE COURSE ON ARTIFICIAL INTELLIGENCE AND GENERATIVE AI IN INSURANCE**

**Course Structure -**

Particulars	Details
Duration of the course	2 days
Mode of Teaching	Virtual Training sessions
Total hours of Teaching	6 hours for Online contact classes
Target Group	Students as well as employees working in Insurance companies
Fees for the course	₹ 3540/- ( ₹ 3000/- + 18% GST)

## Post-Graduation programs in collaboration with Mumbai University

### POST GRADUATE DIPLOMA IN HEALTH INSURANCE (PGDHI)

The Insurance Institute of India, together with the Mumbai School of Economics & Public Policy (Autonomous) of University of Mumbai jointly launched this professional program “PGDHI” in 2013-14.

The Post Graduate Diploma in Health Insurance (PGDHI) is a one year part time post graduate (two semesters) program.

The PGDHI Course comprises 7 Papers and a Research Project.

The Course covers all aspects of Health Insurance including health economics, product development, rating, risk evaluation, human anatomy, diagnostics, underwriting, claims processing, importance of data analytics, fraud prevention and functioning of Third Party Administrators (TPAs).

### POST GRADUATE DIPLOMA IN INSURANCE MARKETING (PGDIM)

The Insurance Institute of India, together with the Mumbai School of Economics and Public Policy (Autonomous) of University of Mumbai has jointly launched this professional program “PGDIM” in 2018-19.

The Post Graduate Diploma in Insurance Marketing (PGDIM) is a one year part time post graduate (two semesters) program.

The PGDIM Course consists of 8 Papers and a Research Project.

The Course covers various topics relating to Insurance Marketing including Principles of Economics and Economic Environment, Risk Management and Underwriting of Life/ General/ Health Insurance lines, Understanding Buyer Behaviour, Marketing, Communication, Branding with specialization in Life Insurance or General Insurance.

- *These courses are designed to provide academic rigour and recognition of the University system along with the domain knowledge and expertise of insurance industry.*
- *Graduates (3 years) in any discipline from University of Mumbai and any recognized University are eligible to apply. Students appearing in the final year of graduation are also eligible to apply.*
- *These courses are designed as classroom programs conducted in IIT's College of Insurance at BKC, Mumbai on weekends.*
- *The Course is rolled out by faculty drawn from the College of Insurance, University of Mumbai and practitioners from Insurance industry.*
- *On successful completion of the course the Diploma is awarded jointly by the Insurance Institute of India and Mumbai School of Economics and Public Policy (Autonomous), University of Mumbai.*
- *A Cash prize of ₹15,000/- has been sponsored by the 1979 Batch GIC Direct Recruit Officers (GIC DRO) for the best student (based on overall performance) of this batch.*

## Other Activities of College of Insurance

### Research Centre

#### Promoting Research

Insurance Institute of India (III) has a stated objective of promoting insurance related research. The Institute, through its Research Centre, has positioned itself as a leader in insurance research over the last few years. III fosters various research initiatives, both in-house and external. III has various schemes to promote individual research initiatives done in various Universities. III recognizes research done by insurance professionals through its research based essay competitions as well.

The Research Centre spearheads III's internal research initiatives on matters relevant to the insurance industry in addition to supporting the external programs. It is recognized by the University of Mumbai as a Centre for Doctoral Research. The Centre supports research activities of the students of its Post Graduate Diploma Programs as well.

#### Research/Consultancy:

III Research Centre takes up Research/Consultancy projects. During the last decade, it has taken up/completed such assignments for GIZ, World Bank, GIC Re, Transport Corporation of India, National Housing Bank, IFSCA, UNDP, SDMC and NDMA in addition to Internal Research Projects.

#### Ph. D. in Business Management:

Insurance Institute of India (III) is a recognized Research Centre of the University of Mumbai for Ph.D. in Business Management under the Faculty of Commerce. The Ph.D. Program is offered on part-time basis. The Ph.D. Degree will be awarded by the University of Mumbai in the subject Business Management under the Commerce Department. It comprises initial six-months of course work if the candidate has not completed M. Phil. The Centre has Research Guide approved by the University of Mumbai.

#### Research Grants for Ph.D. Students

There are 3 types of grants awarded by the Insurance Institute of India for scholars doing for Ph. D. Research on Insurance related subjects with any Indian University.

- 1) Research grant for pursuing doctoral studies – full time – grant amount – maximum up to ₹ 1,00,000/- (Category 1)
- 2) Research grant for pursuing doctoral studies – part time – grant amount – maximum up to ₹ 50,000/- (Category 2)
- 3) One time Research grant for JRF candidates – grant amount – maximum up to ₹ 50,000/- (Category 3)



## List of Research Projects

Details of the various research studies done by the Research Centre are listed below. Names of organisations which have commissioned/ sponsored/ partnered in the research studies are also mentioned alongside.

Sr. No.	Topic	Organisation
1	PWC Project for Building Capacity of IDRA and the Bangladesh Market i) Awareness and Insurance Literacy Program ii) Asset Liability Management Study iii) International Regulatory & Supervisory Program	Insurance Institute of India and M/s. PriceWaterCoopers Ltd.
2	Performance Evaluation of the Tibetan Medicare System	The Tibet Fund (TTF) & Insurance Institute of India
3	Bridging the Protection Gap in Insurance - Drivers and Obstacles	General Insurance Corporation of India (GIC Re) & Insurance Institute of India
4	III Survey – "Telemedicine – New Trend in Health Care"	Internal (Insurance Institute of India)
5	Survey for knowing the risk perception in near future for Indian insurance industry	Internal (Insurance Institute of India)
6	Survey on "Impact Of Covid - 19 Pandemic On Insurance Fraud Risk Mitigation And Investigation"	Insurance Institute of India (III) along with the Association of Private Detectives and Investigators (APDI), the International Fraud Training Group (IFTG) and Lancers Network Ltd.
7	Survey on "Customer Behavior in Purchasing Life and Health Insurance"	Internal (Insurance Institute of India)
8	Survey on "Impact of Covid-19 on Health and Life Insurance"	Internal (Insurance Institute of India)
9	III Survey "Post Covid-19 Times - Strategic Concerns for the Insurance Industry"	Internal (Insurance Institute of India)
10	Giving Life to Life Insurance	Internal (Insurance Institute of India)
11	Challenges in insuring the flood prone areas in Mumbai	General Insurance Corporation of India (GIC Re) & Insurance Institute of India
12	Property Insurance in New and Existing Housing	National Housing Bank & Insurance Institute of India.
13	Insurance Requirements of the Indian Logistics & Warehousing Industry and its Customers (In-Country Operations)	Transport Corporation of India Ltd. & Insurance Institute of India.
14	Country Landscape Study on Mutual and Cooperative Insurers in India	International Cooperative and Mutual Insurance Federation (ICMIF) & Insurance Institute of India
15	Design and Product Performance of the Industrial All Risks Policy	General Insurance Corporation of India (GIC Re)
16	Building Financial Resilience of SAARC Countries against Natural Disasters: The Insurance Option	Insurance Institute of India & SAARC Disaster Management Center
17	Microinsurance Regulations in India - Situational Analysis and Assessment - GIZ report	GIZ
18	Insurance Products Designed for Rural India	Internal (Insurance Institute of India)
19	Customer Satisfaction on Services & Level of Awareness of Activities of Associated Institutes of Insurance Institute of India	Internal (Insurance Institute of India)
20	Buying Behaviour and Customer Satisfaction vis-a-vis Life Insurance in India	Internal (Insurance Institute of India)

## SEMINARS AND WEBINARS

Insurance Institute of India (III) has been conducting seminars, webinars and conferences of the following four categories for building/ developing professionalism in the industry and addressing the academic needs of the insurance fraternity, as also positioning the leadership the College/ Institute.

- Bonding by Professionalism (BBP) ● Look Beyond (LB) and ● Look Deep (LD) ● One-off Conferences (OOC)

Sr. No.	Name of Seminar
1	G V Rao Memorial Lecture and Seminar on Fighting Insurance Fraud through Technology
2	Career Opportunities in Insurance Industry
3	Role of Human Resource Management in Insurance Industry
4	69th Foundation Day Seminar on Actuarial Education and Cutting-edge Technologies for the Insurance Sector
5	Fraud Fighting Frameworks in the Indian Insurance Industry
6	G V Rao Memorial Lecture on Transition to International Financial Reporting Standard (IFRS) 17: Headwinds and Tailwinds
7	Seminar on Insuring a Sustainable Future: The Importance of ESG
8	68th Foundation Day Seminar on Technology: Changing the landscape of the Insurance Industry
9	Deeper Insights into Modern Day Insurance Fraud and the Psychology of the Fraudster: Focus - Social Media Fraud
10	Disaster Risk Resilience and the Insurance Mechanism
11	Strategies towards realizing a fully insured India: Focus – Life Insurance
12	Conclave on Fraud Prevention in Motor Insurance Claims
13	Increasing Insurance Penetration
14	67th Foundation Day Seminar on Health Insurance Emerging Skylines
15	Disaster and Insurance Awareness - Monthly Online Webinar (DIA-MOW) - Bihar, Jharkhand, Orissa, West Bengal, Delhi, Haryana, Jammu & Kashmir, Himachal Pradesh, UP, Punjab, Uttarakhand
16	Disaster and Insurance Awareness - Monthly Online Webinar (DIA-MOW) - Gujarat, Maharashtra, Goa, Rajasthan, Madhya Pradesh, Dadra & Nagar Haveli and Daman & Diu
17	Disaster and Insurance Awareness - Monthly Online Webinar (DIS-MOW) - Andhra Pradesh, Karnataka, Kerala, Pondicherry, Tamil Nadu and Telangana
18	Disaster and Insurance Awareness - Monthly Online Webinar (DIA-MOW) - Arunachal Pradesh, Assam, Manipur, Meghalaya, Mizoram, Nagaland, Sikkim and Tripura
19	Disaster and Insurance Awareness - Monthly Online Webinar (DIA-MOW) - for all states
20	III Webinar on Prospects of Education in Insurance Sector
21	III Webinar on Insurance Fraud and Investigation
22	III, RAUCH and ACMA Webinar on the Need of Crisis Resilience in the Insurance Sector
23	III Webinar on Road Safety
24	III and MSEPP Webinar on Career prospects of Insurance Education in Insurance Industry in the New Normal
25	III Webinar on Virtual Round Table Covid 19 Learnings for the Insurance Ecosystem

### III LIBRARY:

Institute has formed a **Knowledge Management Centre** to arrange seminars on insurance and related subjects, to conduct research work on various technical subjects of Insurance, to maintain library and to publish journal and e-newsletters.

**The Library** has a collection of books (around 8500) in the subject of Insurance, Management, Economics, Banking and Finance. The library also has a collection of Studies in insurance. The premium collection of books includes the publications of the Witherby Publishers, Lloyds, London and publications of eminent international institutes such as the Chartered Insurance Institute (CII London), American Institute for Chartered Property Casualty Underwriters (AICPCU), Life Office Management Association (LOMA) and Life Insurance and Market Research Association (LIMRA).

The library has subscribed to magazines/periodicals on insurance other subjects. Access to the library is available to Insurance Institute of India's (III) Members, Trainees of COI, Insurance Professionals, Researchers, Educational Institutes/Colleges, among others Corporates, Faculty members and III Staff.

### ONLINE LENDING LIBRARY (OLL)

Insurance Institute of India has initiated an Online Lending Library (OLL) for III members, college students, research scholars and insurance professionals.

OLL Members have the flexibility to order, renew and return books online as well as in person.

### GROUP CORPORATE MEMBERSHIP (GCM)

This facility is for corporates having multiple branches across India. Under the GCM, the companies are given multiple logins to use the library facility. A maximum of 20 books are issued to companies at any point of time.

- Free home delivery and pick up of books.
- Delivery within 48 hours from order.

Online Library Facility is available only for India. Study material of III is not available under Online Lending Library services.

### PUBLICATION:

- **THE JOURNAL**

The Journal is a quarterly publication emanating from the Insurance Institute of India. It is listed with UGC Care List since January 2023.

It is published in the months of January / April / July and October every year in both hard and soft forms.

The Journal covers a wide range of issues related to insurance and allied areas.

- **e-PUBLICATIONS**

- InsuNews - Weekly e-newsletter
- Happenings at the Institutes - Monthly e-newsletter

## Visiting Faculty / Industry Experts

### (INDICATIVE LIST IN ALHPABETICAL ORDER)

Details of the various research studies done by the Research Centre are listed below. Names of organisations which have commissioned/sponsored/partnered in the research studies are also mentioned alongside.

Name	Position Held	Area of Expertise
Mr. A. K. Singhal	Head - Insurance Cum Advisor for Legal Firm	Legal, PSU Matters, HR
Mr. Ajay Kumar Kanth	Head – Fraud Risk Management Unit, Aditya Birla Finance Limited	Fraud Prevention & Control, Investigation, Compliance, Legal & Secretarial
Mr. Amitabha Ray	CEO, Swiss Re India Branch	Property Treaty Underwriting, alternative risk transfer solutions, parametric and index covers
Mr. Anabil Bhattacharya	Former Chief Manager, Head office, National Insurance Company Ltd, Kolkata	Principle & Practice of Insurance, Fire, Engineering, Misc. Insurance, Legal (Motor TP), RTI & HR and Risk Management
Mr. Anant R Nayak	Retd. Sr. Divisional Manager (LIC), CFA	Financial Markets
Dr. Aninda Chatterjee	Clinician, Ex-Panel Physician for LIC & National Insurance Company of India(NICL), Visiting Faculty	Healthcare Management, Hospital Operations, Quality Assurance Medico-Legal, Life & Health Insurance Fraud Management.
Mr. Anshu Shekhar	Deputy Manager (Legal) at Head Office, National Insurance Company Limited	Motor Third Party Claims Management
Mr. Anurag Rastogi	CEO, Insyght Analytics LLC UAE Chairperson, Education Committee, Institute of Actuaries of India Ex. Chief Actuary & Chief Underwriting Officer	Actuarial, Underwriting, Strategy, Insurance Profitability Turnaround, Mergers & Acquisitions
Ms. Archana Nirmal Kanthode	Regional Manager, Oriental Insurance Co. Ltd.	Marketing, Health Insurance, Motor Vehicles Insurance, Property Insurance, Training of agents, POSPs, Business Development Role Employees(BDE/BDM/SBDM),
Mr. Ashish Ajmera	Independent Surveyor	Motor Claims

Name	Position Held	Area of Expertise
Mr. Ashok M. Gawarikar	Proprietor, Transocean Marine & General Survey Agencies	Hull, Cargo, Energy - Loss Assessment and Investigation
Mr. Ashutosh Shukla	Puri Crawford Insurance Surveyors and Loss Assessors India Pvt Ltd	Engineering Project, ALOP Monitoring CAT Claims Fire Claims Breakdown Claims Business Interruption Claims Asset Valuation.
Mr. Avez Sayed	Chief Risk Officer; Bajaj Allianz General Insurance	Enterprise Risk Management, Operational Risk Management, Information & Cyber Security, Business Continuity Management, ESG and Climate Risk
Mr. Balachandran M K	Ex. Head of Rural and Micro Insurance, SBI General Insurance	Rural Insurance
Ms. Beena Mandrekar	Freelancer, Visiting Faculty, Symbiosis Institute of International Business	Business Communication, Soft Skills, Creative Problem Solving.
Dr. Bharatbhushan S. Powdwal	CEO & MD, Brilliant Solutions Management, Consulting Surgeon at various Hospitals in Mumbai.	Health Insurance, Health care Management, Insurance Frauds, Investigation, Process Automation in Underwriting, Claims and Frauds
Ms. Bharathy R. Iyer	General Counsel & CCO with Aon Ins. Brokers Pvt. Ltd., Mumbai.	Governance, Compliance and Legal Affairs, General insurance UW & Claims
Mr. Herpreet Singh Bright	Mechanical Engineer, IRDA License Surveyor	Surveys and Loss Assessment and Investigator In Insurance Industry, Specialist in high value High Profile Media high cases he has experience in flood and fire claims.
Mr. C L Baradhwaj	Practising Company Secretary (Insurance & Corporate Laws)	Regulatory Compliance, Corporate Governance and other Corporate laws
Mr. Charusheel K. Tandel	Freelancer, Chartered Insurer, Ex-Kuwait Insurance Co. Ltd.	Property Lines Claims
Mr. D. G. Halve	Consultant	Crop Insurance



Name	Position Held	Area of Expertise
Mr. Delzad D. T. Jivaasha	Deputy Vice President - Enterprise Risk Management and Information Security, ICICI Lombard General Insurance Company Limited	Enterprise Risk Management, Environmental, Social and Governance (ESG) Risk Management, Technology and Artificial Intelligence Governance and Risk Management, Solvency II, Risk Based Supervision, Basel III, Corporate Governance, Audit, Business Continuity Planning, Operational Risk Management, Market Risk Management, Credit Risk Management, Compliance, Geo Political Risk Management
Mr. Dhananjay Naidu	Manager Fire and Engineering Department, Head Office, National Insurance Co Ltd	Underwriting Mega Risks, Underwriting Fire policies, Projects/Engineering Risks, Inspection of Risks Assessment of PML, Reinsurance of Large Risks
Mr. Frederick Ronald Dsouza	Consultant	Insurance, Technology, Training and Development, Social Service
Mr. Frederick Wharton	President/CEO , North American Training Group and International Fraud Training Group	Insurance Fraud and Investigations, Financial Frauds, Health Care and Fraud Training
Mr. G S Krishnan	Consultant & Partner, Vignaharta Value Creators (Financial Planning & Advisory) Experience in Project Management for Regulatory Bodies and IT Companies	Project Implementation , Consultancy, Financial Planning, Rotarian Member, Music, Travel, Giving Lectures
Ms. Gomathi Shekar	Regional Manager, The New India Assurance Company Limited	Marine Cargo Insurance
Mr. Hitesh Joshi	Executive Director, Reinsurance Operations With General Insurance Corporation of India.	Aviation Insurance
Dr. J Michael Skiba	COO/President-International Fraud Training Group. Department Chair-Criminal Justice, Financial Crime, Colorado State University Global Campus	Fraud, Financial Crime, and Cybercrime
Mr. J V Prasad	Independent Actuarial Consultant	Pricing, Reserving, Capital Modeling, Risk Management, IFRS, Analytics In General Insurance

Name	Position Held	Area of Expertise
Mr. Jatin Punjani	Founder & CEO, Profound Risks Services LLP	Consulting In Liability, Sports, Entertainment and Aviation Risks
Mr. Jayasager Kt	Director, Actuarial Services, BDO INDIA LLP	Actuarial Science
Mr. Jitendra Tawarmalani	EX. Principal of Mumbai Regional Training Centre, The Oriental Insurance Co. Ltd.	Medicclaim, Motor, PA, All MISC. Policies, Softskills, Communication Skills, Marketing, Presentation, Motivational Speaking, Consumer Forum, Grievance Redressal, Ombudman, HR, Agents Grooming, Interpersonal Relationship, Claims Management, Customer Services
Mr. Joydeep Roy	ED, Saferisk Insurance Brokers Pvt Ltd, Ex. CEO, IFFCO Tokio Insurance Services, Ex. CEO Phoenix of Botswana, Botswana, Africa, Ex. COO Reliance Insurance Tanzania, Africa	Marine Cargo Insurance, Hull & Energy, Property, Distribution
Ms. Jui Buch	Strategic Insurance Advisor to various multinationals	Liability Insurances – D & O Liability, CGL, Cyber, Technology E&O, Professional Indemnity, Environmental Liability, Energy Insurances – Oil & Gas, Onshore and Offshore Energy, Drilling Insurances
Ms. Kasturi Sengupta	General Manager, National Insurance Co. Ltd. Executive Director(Designate),New India Assurance Co Ltd	Health Insurance Miscellaneous Insurance, Liability Insurance, Sports & Film Insurance
Mr. Kolli N Rao, PhD	President & Senior Advisor, Aon India	Agriculture Insurance, Reinsurance, Risk Management
Ms. Lata Shekhar Iyer	Dy. General Manager, The New India Assurance Co. Ltd.	Marketing Management, Motor Third Party and Consumer Cases Case Studies
Ms. Leena B. Mody	Proprietor, M/S. Leena Mody and Associates	Marine Hull Claims
Mr. M. Thiripalraju	Former Director, Indian Institute of Capital Markets	Capital Market, Finance, Economics

Name	Position Held	Area of Expertise
Ms. Madhulika Bhaskar	Deputy Secretary, General Insurance Council, Retired as General Manager & Director of GIC, Held the post of CMD, New India Assurance Company on additional charge basis for a period of 6 months.	Reinsurance
Mr. Manoj Kumar A. S.	Specialty Head, Aon India	Specialty Lines
Mr. Manoj Kunder	Head – Market Underwriting (VP), SBI General Insurance Company Limited	General Insurance Underwriting With Specialization in Aviation, Surety & Reinsurance
Mr. Mihir Vora	Head, Corporate Business, Edme Insurance Brokers Ltd	Property, Business Interruption, Engineering, Liability and Risk Engineering
Mr. Milind V. Kolhe	Head - Techno Commercial and Principal Officer IIO, GIFT City Gandhinagar, ICICI Lombard General Insurance Company Limited	Commercial Lines Underwriting, Reinsurance, Risk Management & Loss Control, Product Development, Claims Management, Agriculture Insurance, Project Insurance and Property Insurance, Structured solutions.
Adv. Mithilesh Pancholi	CEO, Think Advisors	Cyber Crime, Intellectual Property Rights, Software Development, Product and Project Manager, Digital Marketing and Customer Relationship Management
Mr. Milind Vasantrao Harsulkar	Free Lance Independent General Insurance Consultant	Fire, Engineering, Underwriting, Claims Management
Mr. Nadeem Mokashi	Vice President – Head of P&C Claim India	Property & Engineering – Large Claims Management
Capt. Mukesh Gautama	Advisor, Wilson Surveyors and Adjusters Pvt. Ltd Lloyd's Agents	Marine Hull and Cargo Surveys. Marine Hull, P&I, General Average and Cargo Claims Adjustments
Dr. (Maj) Mukund Kulkarni	Head of Life & Health Insurance, IIB	Data governance, Data driven decisioning, Risk assessment, Risk management, Underwriting, Claims, Products, Insurance medicine
Ms. Nandita Banerjee	Manager(Retired), National Insurance Co Ltd	Health Insurance, Miscellaneous Insurance

Name	Position Held	Area of Expertise
Mr. Nikhil Patil	Business Facilitator, Government E-marketplace Maharashtra,	Gem Portal F
Mr. Nivrtee Magar	Vice President : Forensic, ICS Assure Services Pvt Ltd	Forensic Science
Dr. Nutan Pakhare	B.A.M.S, Assistant Professor YOGA(UGC), MSC (YOGA), PGDYS, CCY, Fellowship in Ayurveda (UK)	Ayurveda Yoga Consultant and Educator
Mr. P Koteswara Rao	Chartered Accountant	Life Insurance Marketing, Finance and Accounts, Investment and Credit Appraisal, Individual Taxation, Audit and Internal Controls, Corporate Governance, Financial Review
Mr. P N Karmakar	Retd. Chief Manager, United India Insurance Co. Ltd	Technical-Fire, Loss of Profit, Health and Miscellaneous
Mr. P Ravi Kumar Reddy	Executive Director, Beacon Insurance Brokers	Fire Material Damage Claims & Business Interruption Insurance
Ms. Pallavi Sinha	Chief Manager, The New India Assurance Co Ltd	Casualty & Liability Insurance, Underwriting
Dr. Pandurang M Bhujang	President Emeritus Association of Hospitals, Visiting Faculty Tata Institute of Social Science, Sir H N Reliance Foundation Hospital	Medicine, Law, Hospital Management, Financial Management, Quality Management, Industrial Relations and Personnel Management
Mr. Parijat Dutta	Former General Manager, GIC Re	Reinsurance, Technical and HR Functions
Mr. Phalguni Purkayastha	Senior Surveyor & Loss Assessor, Risk Control Consultancy Organisation	Fire, Engineering, Risk Management , Loss Prevention & Safety Management
Mr. Pradip Sarkar	Ex. Chief Regional Manager, United India Insurance Company Ltd, Ex. Principal of The COI, Kolkata	ALL General Insurance Subjects
Mr. Pradipto Sen	Senior Consultant & Trainer - Anti Fraud, Operations, Risk Management & Compliance Expert	Life Insurance - Operations, Risk Management (FRMAI), Fraud Investigation & Monitoring (CIAFP), AM/CFT (NISM), Claims, ERM

Name	Position Held	Area of Expertise
Ms. Pragnya Acharya	Partner - HMR Risk Consultancy	Casualty & Liability Insurance Underwriting, Profit Centre Management, Product Development, Leadership and Team Collaboration
Mr. Prem Chandra Shukla	Fellow & A category surveyor and loss assessor & Ex. council member of Indian Institute of Insurance Surveyors & Loss Assessors	Fire, Enng., Inland Cago & Miscellaneous surveys and loss assessment
Ms. Priyanka Guatama	Chief Underwriter officer, Markel India	Casualty lines, Financial Lines, Cyber Underwriting, Liability claims, Team Management, Sales and Channel Management
Mr. R Balasundaram	Secretary General, Insurance Brokers Association of India (IBAI) and Sr. Advisor, CRB at WTW	Marine Insurance Underwriting , Claims , Channel Management, Soft Skills, Insurance Brokers' Regulations, management of broking firms.
Dr. R K Duggal	Principal Officer, KUWY, Ex. Faculty (General Insurance), Insurance Institute of India, AVP, Prudent Brokers (Government and Rural Business) Chief Manager, New India Assurance (Rural Micro and Agri. Business CSR, Health and RTI and Govt. Business)	Rural, Micro & Agri Business Dept., Animal and Sheep Husbandry Depat.
Mr. R Narasimhan	Head of Commercial lines underwriting	Property and Casualty Insurance, Underwriting and Risk Management
Mr. Raghunath Kopalle	Consultant, JB Boda Reinsurance Brokers & Freelance Faculty	Reinsurance
Mr. Rajesh Yagnik	Senior Executive Director J.B.Boda Insurance and Reinsurance Brokers Pvt. Ltd. Accomplished International Trainer	Insurance, Reinsurance
Dr. Ranjith Krishnan	Sustainability Consultant	Corporate Laws/ESG/Sustainability



Name	Position Held	Area of Expertise
Mr. Ravi Seshadri	Strategic Advisor - Insurance & Insurtech, Ex AXA Vice President	Risk Management, General Insurance, Marketing, Insurance Compliance, Labour Laws, Business Law, Compensation Management, Digital Transformation, Corporate Governance and Ethics
Mr. Ravinder M.	Executive Coach and Trainer- Insurance Domain and Leadership Development.	Accident, Health, Rural Social, Micro Insurance, Underwriting Claims Management, Product Design, Business Development, Channel Management, Leadership Training.
Mr. Ravinder Singh Chawla	Founder and Managing Partner - RSC Skillbuilding and Consulting Solutions LLP, Formerly Vice President (Emerging Markets) – HDFC Life Insurance Co. Ltd., CFP®	Financial Planning; Selling Skills; Customer Service, CRM
Mr. Ravindranath Nayak	EX. General Insurance Co. of India	Reinsurance, Reinsurance Accounts, Claims Management, Anti-Money Laundering, Solvency Margin & Solvency-II, Risk Based Capital.
Mr. Samir Kumar Das	Retired Chief (Investment), LIC of India, Central Office, Mumbai	Investment management of Life Insurance, ULIP & Annuities, Risk management, Customer Relationship Management
Dr. S. Kutty	Ex. Faculty (Life Insurance & Research), College of Insurance	Life Insurance, Micro-Insurance, Customer Relationship, Marketing and various Management Topics
Mr. S.V. Sunder Krishnan	CEO of Clarimonde Solutions - a consulting Company	Enterprise Risk Management, Internal Audit, Legal, Information Security, Claims and Compliance
Mr. Sai Srinivas Dhulipala	Consulting Actuary	Actuarial, Risk Management and IFRS17 Implementation
Mr. Saket Singhal	Actuary and Founder, Transvalue Consultant, The consulting and appointed Actuary, Oriental Insurance Co. Ltd. and Tata AIG General Insurance Co. Ltd.	Actuarial science, Investment, Employee Benefit, Valuation and Accounts, Risk Based Capital

Name	Position Held	Area of Expertise
Dr. Sangita R. Shinde	Consultant – The World Bank	Health Insurance Underwriting and Claims, Provider Network
Dr. Sanjay M Tiwari	Head – Internal Control and Loss Minimization (ICLM), ICICI LOMBARD GIC LTD	Organization Level Risk and Fraud Management Framework and Practices. Process Re-Engineering. Design Thinking. Health Insurance - Claims, Networking Underwriting and Fraud Risk
Mr. Sarbjit Singh Bright	Surveyor & Loss Assessor	Motor & Investigation
Mr. Sateesh Bhat	Appointed Actuary, General Insurance Corporation of India (GIC Re)	General Insurance
Mr. Satish Babu Khiradkar	Key Business Office Incharge (Divisional Manager), The New India Assurance Co Ltd	Fire Underwriting, Motor Own Damage, Motor Third Party, Reinsurance, General Insurance Finance and Investment
Mr. Satish Raju	APAC Lead Insurance and Banking- Planet, Ex. CEO Swiss re India Branch	Reinsurance, Disaster risk financing, Catastrophic Risk Management
Mr. Saumil D Mehta	Director, Mehta & Padamsey Insurance Surveyors & Loss Assessors Pvt. Ltd	Insurance survey and loss adjusting for property, miscellaneous, liability, Engineering Insurance, Business Interruption
Dr. Shariq Nisar	Professor of Finance At Rizvi Institute of Management Studies and Research	Islamic Finance, Takaful, Mutual Insurance and Microfinance
Mr. Shashwat Srivastav	Manager, National Insurance Co Ltd	Mega Risk, Project Insurance, Specialized Risk Insurance, Reinsurance
Mr. Sibesh Sen	Training Consultant	Marine Cargo Insurance, Agency and Broking Sales in GI
Dr. Sidheswar Madanlal Sharma	Vice President - Accident and Health Claims	Claims Management, Underwriting and Travel Insurance, Provider Management, Fraud and Abuse, Medical Coding and Medical Management, Stress Management

Name	Position Held	Area of Expertise
Mr. Sohesh Shah	Founder of Investrite Fintech LLP	Succession Planning & Estate Planning
Mr. Sourabh Roy	Legal Hub In-Charge, Ahmedabad Regional Office, National Insurance Co. Ltd.	Handling & Management of Motor Third Party, Consumer, Civil and Arbitration cases.
Ms. Suchitra R.	Chief Manager, The New India Assurance Co Ltd	Claims Management, Intemediary verticals, Underwriting ,Claims and Accounts, Reinsurance Fac
Ms. Suman Ganguly	Consultant for Marine Insurance	Marine Cargo Insurance
Dr. Sunder Ram Korivi	Adjunct Faculty, Indian Institute of Corporate Affairs (Ministry of Corporate Affairs, GOL)	Financial Markets
Mr. Suresh Balakrishnan	TransAsia Risk Advisors	Reinsurance, Liability Insurance-Cyber Security, Specialist/Bespoke Policy Wording
Mr. Suresh D. Shah	Independent Surveyor, Loss Assessor, Valuer and Chartered Engineer Having 45+ Years of Experience	Fire, Engineering, Miscellaneous, Marine and Loss of Profit Insurance, Advance Loss of Profit, Risk Inspection, Risk Management, Fixed Asset Valuation for various purposes etc.
Mr. Thomas Moffatt	Associate Director at Unison Insurance Brokers	Property Engineering Underwriting and Claims, Risk Management, Fire, Engineering, Miscellaneous Insurances
Mr. Uday Gurunath Bhogate	Partner, UBI Surveyor and Loss accessor	Marine, Marine Warranty , Oil and energy claims and Risk Management
Mr. Umesh Bagri	Consultant	Fire, BI, Marine, Motor, Miscellaneous Insurances , High Value Complex Claims, AIML Based IT Projects Implementation, Claims Management
Ms. Uttara Vaid	Founder -Uttara Vaid Advisory Services LLP.	Liability Insurance
Mr. Varun Ashok Gawarikar	Founder, V2RT Insurtech Solutions Pvt Ltd.	Cargo Insurance Claims, Cargo Frauds, Cargo Insurtech and Data Analytics, Cargo Loss Prevention
Mr. Vibhaw Kumar	Executive Vice President, Anand Rathi Insurance Brokers Ltd.	Liability Insurance, Fine Arts Insurance, Drone Insurance

Name	Position Held	Area of Expertise
Mr. Virendra Gupte	Formerly - Head - Trade Services and Chief Ethics Counsellor - TATA International Limited (TATA Group Company) Independent Director , Consultant , Corporate Trainer and Senior Visiting Faculty	Governance and Business Ethics, Global Risk Management, Business Excellence Processes, Social Accountability, Setting Up Companies Abroad, Export Procedures, RBI, ECGC and EXIM Bank Procedures, Advocacy, Corporate Induction and Training on Tata Code of Conduct /Business Ethics Management, Visiting Faculty in B Schools, Leadership Skills , Strategic Management , Decision Making , Sustainability in Business / ESG
Mr. Vishal Dubhashi	Executive Vice President & Head - Risk & Loss Mitigation Dept., HDFC ERGO General Insurance Company Ltd.	Core domain expertise lie in Policy & Strategy of Risk Management, Credit Control & Fraud Risk encompassing Legal, Audit & Compliance frameworks in Banking and Insurance sector.
Mr. Vivek Sawant	VP Motor Underwriting, ICICI Lombard	Motor Insurance-Underwriting, Operations, Claims

## Facilities at Insurance Institute of India

### CLASSROOMS



### AUDITORIUM



### LIBRARY



HOSTEL ROOMS, CAFETERIA AND RECREATION CENTER





# **PROFESSIONAL EXAMINATION**

## Courses Offered by III

### PROFESSIONAL CERTIFICATION

- Licentiate
- Associateship
- Fellowship

### SPECIALISED DIPLOMA

- Marine Insurance
- Fire Insurance
- Health Insurance
- Life Insurance Underwriting

### CERTIFICATE / DIPLOMA / ADVANCED DIPLOMA

- Foundation of Casualty Actuarial Science

### COURSES IN COLLABORATION

- Certificate Course On Compliance, Governance and Risk Management (with Institute of Company Secretaries of India)
- Certified Insurance Anti-fraud Professional (CIAFP) (with North American Training Group)
- Life Insurance Underwriting (with Association of Insurance Underwriters)

### COURSES WITH UNIVERSITY OF MUMBAI

- Post Graduate Diploma in Health Insurance (PGDHI)
- Post Graduate Diploma in Insurance Marketing (PGDIM)
- Ph.D. in Business Management

## **Regulatory Examinations**

**REGULATORY EXAMINATIONS - The Institute conducts online trainings and examinations authorized by the Insurance Regulatory and Development Authority of India (IRDAI)**

- Pre-licensing Examination For Insurance Surveyors And Loss Assessors
- Pre-licensing Examination of Web – Aggregators
- Pre-licensing Examination of Insurance Marketing Firms
- Pre-appointment Examination of Insurance Agents
- Pre-licensing Examination of Corporate Agents
- Pre-licensing Examination of Authorised Verifiers of Insurance Brokers

### **ONLINE TRAININGS**

- Insurance Broker - Training (Fresh and Renewal) - BQP and PO
- Insurance Agent - Training
- Corporate Agent - Training (Fresh and Renewal)
- Insurance Marketing Firm - Training (Fresh and Renewal)
- Web-Aggregators - Training (Fresh and Renewal)
- Authorised Verifiers of Insurance Brokers - Training
- POSP/MISP - Training and Examination

### **POSTAL LIFE INSURANCE**

- The INSTITUTE provides training and conducts the licentiate examination on behalf of the Postal Life Insurance Authority of India across the country in all major Indian languages for POSTAL LIFE INSURANCE AGENTS and RURAL POSTAL LIFE INSURANCE AGENTS.

## Online Examination Schedule for the Year 2025

	Steps & Details		Exam Month & Year			
			March - 2025	June - 2025	September - 2025	December - 2025
1	Registration (New Candidates) *		6 <sup>th</sup> to 12 <sup>th</sup> January 2025	7 <sup>th</sup> to 13 <sup>th</sup> April 2025	4 <sup>th</sup> to 11 <sup>th</sup> July 2025	3 <sup>rd</sup> to 9 <sup>th</sup> October 2025
	Subject Enrollment (Payment of fees)					
	Change of Centre **					
	Change of Subject **					
	(subject having similar credit points)					
2	Slot Booking - Book date & time of the examination for enrolled subjects		5 <sup>th</sup> to 10 <sup>th</sup> February 2025	5 <sup>th</sup> to 10 <sup>th</sup> May 2025	4 <sup>th</sup> to 9 <sup>th</sup> August 2025	6 <sup>th</sup> to 11 <sup>th</sup> November 2025
3	Examination Day & Dates	Saturday	01 <sup>st</sup> March, 2025	7 <sup>th</sup> June, 2025	13 <sup>th</sup> September, 2025	6 <sup>th</sup> December, 2025
		Sunday	02 <sup>nd</sup> March, 2025	8 <sup>th</sup> June, 2025	14 <sup>th</sup> September, 2025	7 <sup>th</sup> December, 2025
		Saturday	08 <sup>th</sup> March, 2025	14 <sup>th</sup> June, 2025	20 <sup>th</sup> September, 2025	13 <sup>th</sup> December, 2025
		Sunday	09 <sup>th</sup> March, 2025	15 <sup>th</sup> June, 2025	21 <sup>st</sup> September, 2025	14 <sup>th</sup> December, 2025
4	Last date to receive Scribe request for Physically/Visually Challenged candidates		24 <sup>th</sup> February, 2025	24 <sup>th</sup> May, 2025	26 <sup>th</sup> August, 2025	25 <sup>th</sup> November, 2025
5	Result to be declared on or before		31 <sup>st</sup> March, 2025	30 <sup>th</sup> June, 2025	30 <sup>th</sup> September, 2025	31 <sup>st</sup> December, 2025

\* New candidates have to first register as a member with III and then pay the paper enrollment fees.

For more details may refer Help manual available on our portal under Examinations >> Help Manual

\*\* Candidates can change centre & subject using own login id on or before last date of enrollment.

For **Professional Examination** related queries:- 022- 69654 244/238/250/239/223. (mrm@iii.org.in)

For **Surveyor Examination** related queries:- 022- 69654 220/259. (surveyor@iii.org.in)

**The examinations for the following certificate courses shall be conducted only in June & December every year.**

- 1) Advanced Diploma in Life Insurance Underwriting
- 2) Certificate Course on Compliance, Governance and Risk Management in Insurance (IRCC).

**Important Note:-** The dates given above are tentative and may be changed if required.

# PHOTO GALLERY

## National and International Association of III



**MOU signed with KES Shroff College of Arts and Commerce on 14th May, 2024**



**MOU Signed with FPSB India on 29th May, 2024 regarding Advance Financial Planning Education in the Country; Fellows of III to directly qualify for CFP® Certification via Fast Track Pathway**



**Anjuman-I-Islam`s - Allana Institute of Management Studies on 3<sup>rd</sup> October, 2024**



**MOU signed with Dr. Homi Bhabha State University, Mumbai on 27th March, 2025**



## Visit to III Office



### Visit of Ms. Preeti Chandrashekhar, President, Institute of Actuaries of India

Insurance Institute of India was privileged to host Ms. Preeti Chandrashekhar, The First Women President, Institute of Actuaries of India along with Ms. Asha Murali, Honorary Secretary, IAI at III Campus, Mumbai.

### Visit of Mr. Siddhartha Mohanty, CEO & MD, Life Insurance Corporation

Insurance Institute of India is privileged to host Mr. Siddhartha Mohanty, CEO & MD, Life Insurance Corporation at III campus. Mr. Siddhartha Mohanty is the President of Insurance Institute of India.



## Events Conducted by III

### Seminar on "Actuarial Education and Cutting-Edge Technologies for Insurance Sector" – 01st July 2024



Insurance Institute of India (III) conducted a seminar on **"Actuarial Education and Cutting-Edge Technologies for Insurance Sector"** on 01<sup>st</sup> July 2024 on the occasion of its 69<sup>th</sup> Foundation day. All through the 68 years of its existence, Insurance Institute of India (III) has been in the forefront in discussing critical issues confronting the industry. In the context of celebrating its 69th Foundation Day it was considered appropriate that III invites industry seniors to examine how the power of Actuarial Science can be used for improving the impact of insurance for the country and those who need it most. This Look Beyond category of seminar on the **'Actuarial Education and Cutting-edge Technologies for the Insurance Sector'** is presented in this context.

### MAHARASHTRA ECONOMIC DEVELOPMENT COUNCIL (MEDC) Insurance & Reinsurance Conference 2025 held on 23rd January 2025



Dr. George E Thomas, Professor (Research and Non-Life) and Dr. Ramesh Satuluri, Asst. Professor (Research and Life) represented Insurance Institute of India as panelist at MAHARASHTRA ECONOMIC development COUNCIL (MEDC) Insurance & Reinsurance Conference 2025 held on 23rd January 2025 in the Panel discussion on "Career Opportunities in Insurance Sector".

## 18th India Rendezvous 2025 (Incorporating the 2nd IFSCA-IRDAI GIFT IFSC Global Reinsurance Summit 2025) from 20th to 22nd January 2025



III Representation in 18th India Rendezvous 2025 (Incorporating the 2nd IFSCA-IRDAI GIFT IFSC Global Reinsurance Summit 2025) - 20th to 22nd January 2025

Dr George E Thomas, Professor, (Research & Non-Life), COI participated in 2nd IFSCA-IRDAI GIFT IFSC Global Reinsurance Summit 2025 and moderated Panel discussion on “Unlocking Potential of Direct Insurance business in GIFT IFSC”.

Mr V. Jayanth Kumar, Faculty (Life Insurance), COI moderated Panel discussion on “Transforming India's Insurance Landscape & Strategies for Inclusive Growth and Universal Coverage by 2047”.

Dr Ramesh Kumar Satuluri, Assistant Professor (Research & Life), COI represented Insurance Institute of India in Education Panel on “Role of insurance training institutes in achieving India's vision of insuring every Indian by 2047”.

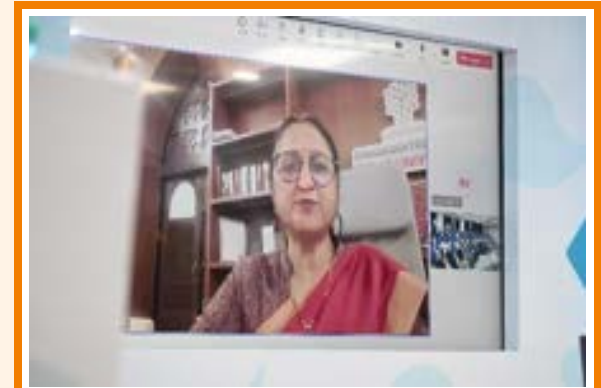


## G. V. RAO MEMORIAL LECTURE - 2024 (Edition: 2) on “Fighting Insurance Fraud through Technology” held on 10th December 2024



Insurance Institute of India (III) hosted G. V. RAO MEMORIAL LECTURE - 2024 (Edition: 2) on “Fighting Insurance Fraud through Technology” on 10th December 2024 at Courtyard by Marriot, Mumbai. Mr. G.V. Rao was a well-known personality who served the Indian insurance industry over fifty five years in various capacities, was also a member of III's Syllabus Revision Committee and involved in various activities of the Institute. In memory of late Mr. G.V. Rao his family set up the “G V Rao Endowment” with III for funding select academic activity to support and enhance professionalism in the areas of insurance and management.

## Seminar on Career Opportunities in Insurance Industry” - 5th December 2024



The Insurance Institute of India (III) proudly hosted a highly successful seminar on "Career Opportunities in the Insurance Industry" on 5th December 2024. The event witnessed an overwhelming response, with ~400 delegates attending in person and many others joining via live telecast on YouTube. The seminar offered invaluable insights into the dynamic and ever-expanding insurance sector, aiming to inspire and guide young professionals and students toward fulfilling careers in this industry.

## COI Training Programs



**Impactful Selling Strategies (18.04.2024 – 19.04.2024)**



**Customized workshop on "Leadership to Entrepreneurship"  
for CLIAs of LIC of India (13.05.2024 – 15.05.2024)**



**Internal Auditors Training for LIC Housing Finance Ltd.  
(10.06.2024 – 11.06.2024)**





**Workshop Training Module on Prospective Brigadeship for Chief Life Insurance Advisors of  
LIC of India (24.06.2024 – 25.06.2024)**



**International Comprehensive Technical Program in Insurance  
(24.06.2024 – 05.07.2024)**



**Achieving Excellence in Customer Experience (08.07.2024 – 09.07.2024)**



**Internal Quality Auditors Training Program -  
SBI Life Insurance Co. Ltd (18.07.2024 – 19.07.2024)**



**Receivable/Recovery Officials of Back Office / Area Office –  
The LIC Housing Finance Ltd. (22.07.2024)**





Regulatory Compliance Program for LIC Compliance 2.0 (23.07.2024 – 25.07.2024)



RUU Training Workshop for SBI Life Insurance Co. Ltd. (26.07.2024 – 27.07.2024)





**LICHFL Induction Training (26.07.2024 – 27.07.2024)**



**Communication as a Tool for Customer Engagement and Retention (13.08.2024)**



**Insight into Business Leadership for Managers (CLIA) of LIC of India (16.08.2024 – 17.08.2024)**



**Project Finance Training for LIC HFL (28.08.2024 – 29.08.2024)**



**Receivable Managers LIC Housing Finance Ltd (24.10.2024 – 25.10.2024)**





Training Session for LIC on IRDAI Regulation, 2024 and Compliance (12.11.2024 – 13.11.2024)



Training program for the Administrative Staff of the office of Insurance Ombudsman (13.11.224 -14.11.2024)





**Train the Trainer Session for EEP for LIC of India (21.11.2024 – 22.11.2024)**



**Induction Training for Junior Assistants of LICHFL (06.01.2025 – 09.01.2025)**



**PolicyMakers Master Class-Sanima Reliance Life Insurance Ltd-Nepal (20.01.2025 - 22.01.2025)**



**Sales Leadership Training Program for Himalayan Life Insurance Co. Nepal (20.01.2025 -25.01.2025)**



**Workshop on Soft Skills for Team Leaders  
(20.02.2025 - 21.02.2025)**

# **CONTACT DETAILS**

**(As per Work Profile)**



## CONTACT DETAILS (AS PER WORK PROFILE)

SR. NO	NATURE OF WORK	EMAIL ID	NUMBERS
Professional Examination Department			
MRM Department+ (Members Relationship Management)			
1	Queries related to Professional Examination (Indian & Overseas)	mrm@iii.org.in	022-69654239
			022-69654250
			022-69654238
			022-69654230
			022-69654244
			022-69654259
			022-69654223
2	Queries related to Surveyor Examination	surveyor@iii.org.in	022-69654230
			022-69654244
			022-69654259
			022-69654223
3	Queries related to Credits for Prior Learning (Exemption)	mrm@iii.org.in	022-69654244
			022-69654223
			022-69654259
Continuing Professional Development			
4	Queries related to Continuing Professional Development	cpd@iii.org.in	022-69654223
			022-69654259
Regulatory Examinations (Broker/Corporate Agent/IMF/WA/Postal Life Insurance)			
5	Queries related IMF (Insurance Marketing Firm)/ Brokers/ Corporate Agents/ Agent Examination/ Web Aggregator/ PLI (Postal Life Insurance)	reg.exams@iii.org.in	022-69654220
			022-69654256
			022-69654208
			022-69654257
College of Insurance			
6	Training	college_insurance@iii.org.in	022-69654251
			022-69654254
			022-69654284
			022-69654234
			022-69654266
			022-69654249
			022-69654270
			022-69654216

SR. NO	NATURE OF WORK	EMAIL ID	NUMBERS
7	Seminar	seminar@iii.org.in	022-69654245
			022-69654281
			022-69654246
			022-69654266
			022-69654249
			022-69654270
			022-69654216
8	PGDHI (Post Graduate Diploma in Health Insurance)	pgdhi@iii.org.in	022-69654281
	PGDIM (Post Graduate Diploma in Insurance Marketing)	pgdim@iii.org.in	022-69654216
			022-69654283
			022-69654285
			022-69654209
			022-69654247
			022-69654270
9	Research	research@iii.org.in	022-69654266
			022-69654252
			022-69654271
Knowledge Management Centre			
10	Library/ Journal/ Newsletter	library@iii.org.in	022-69654270
		journal@iii.org.in	022-69654281
		newsletter@iii.org.in	022-69654242
			022-69654289
Regulatory Examinations (Broker/Corporate Agent/IMF/WA/Postal Life Insurance)			
11	Purchase of study material / queries to dispatch books / non-receipt of parce	studymaterial@iii.org.in	022-69654288
			022-69654267
			022-69654231
			022-69654264
			022-69654217



## Directions to Insurance Institute of India (III) and College of Insurance (COI)



**Address:**

**Insurance Institute of India (College of Insurance)**

G Block, Plot No. C-46, Bandra Kurla Complex,  
Bandra (E), Mumbai - 400 051.

⊙ Map not to scale



## कॉलेज ऑफ इन्शुरेन्स COLLEGE OF INSURANCE

Plot No. C-46, G - Block, Bandra Kurla Complex, Bandra (E), Mumbai - 400 051, India.

[www.insuranceinstituteofindia.com](http://www.insuranceinstituteofindia.com)

[www.coi.org.in](http://www.coi.org.in)