



Agency Management – April 10-12, 2019

Sheraton Portland Airport Hotel ▪ 8235 NE Airport Way ▪ Portland, OR 97220

Class Registration Fee: \$416 For hotel reservations call (503) 281-2500

Hotel Guestroom Rate: \$163 Single/Double

Cut-off Date for hotel rooms: 3/19/19 Shuttle available from the airport

Education Consultant: Kathleen Fraley, CIC, CPIW – Coordinator: Pam Busch

Wednesday, April 10, 2019

7:00 am-7:45 am

Registration with Coffee and Rolls

7:45 am-12:00 pm

Section 1

Strategic Planning

*David Walker, CIC, CRM, ARM, AAI, LIC
Hartland Insurance Agency, Inc.
Hartland, MI*

12:00 pm-1:00 pm

Lunch on your own

1:00 pm-5:00 pm

Section 2

Talent Acquisition and Development

David Walker, CIC, CRM, ARM, AAI, LIC

5:00 pm-5:15 pm

Exam Briefing

Thursday, April 11, 2019

7:30 am-8:00 am

Coffee & Rolls

8:00 am-10:00 am

Section 3

Client Acquisition and Retention

*Mary A. LaPorte, CIC, CPCU
LaPorte Consulting, LLC
Delton, MI*

10:00 am-12:00 pm

Section 4

Technology Utilization

Mary A. LaPorte, CIC, CPCU

12:00 pm-1:00 pm

Lunch on your own

1:00 pm-2:00 pm

Technology Utilization (Continued)

Mary A. LaPorte, CIC, CPCU

2:00 pm-5:00 pm

Section 5

Ethical Responsibility

Mary A. LaPorte, CIC, CPCU

Friday, April 12, 2019

8:00 am-10:00 am

Optional Exam

- **Materials:** Notebook will be provided. You may want to bring a highlighter, note cards or post-its. Electronic notebook will be ready on PROfile (formerly MyPage) approximately one week out from class.
- **Dress Code:** Dress code is informal. Room temperature may vary so dressing in layers is a good idea.
- **CE Credit:** Oregon licensed participants who attend entire institute will earn 16 credit hours (13 + 3 Ethics). For CE credit in other states [click here](#)
- **Ethics Credits:** PIA offers Ethics & Law courses via limited [live classes in both Oregon and Washington](#), as well as live Ethics [webinars](#) and on-line CE through [Kaplan](#).
- **Cancellation policy:** Full refund if notification is 11 business days prior to the institute. If cancelled 3-10 days prior, \$50 fee applies. If cancelled 1-2 business days prior, \$150 fee applies. No refund if participant is a "no-show". All cancellations must be received in writing.