



College of Insurance

Insurance Institute of India, Mumbai

Virtual Training Session on Compliance Management for Principal Officers of Corporate Agents-Banks (CVT- CMPFCA), (On: 16th December, 2024)

Program Concept and Objectives:

The Principal Officer has a critical responsibility to discharge as he/she is exclusively appointed to supervise all the activities of the Corporate Agent. The scope of the activities is varied starting from Implementation of board approved policy, procuring insurance business managing conflicts of interest, regulatory disclosures and compliance, working out arrangements with Insurers for distribution of products, maintaining records, servicing of policyholders while ensuring strict adherence to code of conduct. The one thread which runs through all these activities for their smooth running is regulatory compliance, which requires thorough knowledge of meaning and rationale of the regulatory provisions covering all the activities.

Keeping the above in view the '*3 hour Virtual Training*' is designed to equip the aspiring and existing Principle Officers with comprehensive knowledge of the regulatory requirements governing all the activities of the Corporate Agents including Banks.

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
- New Developments in Regulatory Framework

Participant Profile:

Principal Officers of the Corporate Agents including Banks working as Corporate Agents. Those persons who aspire to be Principal Officer including experienced Specified Persons of Corporate Agents. The employees managing Corporate Agency, Bank tie-ups.



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Program Coordinator:

Mr V Jayanth Kumar

022-69654285

Email: vjayanth@iii.org.in

Program Duration & Timing:

1 day & from 10.00 a.m. to 01.00 p.m.

Program Fees:

The Program Fees: Rs.1770/- (Rs. 1500 /- + 9% CGST + 9% SGST)

How to Enroll:

Please click the below link to register the program

https://www.insuranceinstituteofindia.com/o/COI_WebPortal/cmc/eventDetails?eventid=2266

Certificate of Participation:

Online Certificate in PDF format will be issued to all the participants.

Program Team:

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