

**Classroom Training Session on  
Comprehensive Training Program for Principal Officers of the  
Corporate Agents (Including Banks) (CT)  
7<sup>th</sup> – 8<sup>th</sup> May, 2025**

**Program Concept and Objectives:**

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

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

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

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

Program ID : CPL

**Program Team:**

Ms. Nilambari Bagde	college_insurance@iii.org.in	022-69654234
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Ms. Sneha Pednekar		022-69654270
Ms. Mrunal Satam		022-69654216

**PROGRAM DURATION &  
TIMING:**

Duration: 2 days  
Time: 10.00 a.m. to 05.00 p.m.

**PROGRAM COORDINATOR:**

**Mr. V Jayanth Kumar**  
Email: [vjayanth@iii.org.in](mailto:vjayanth@iii.org.in)  
Contact No: 022-6965285

**PROGRAM FEES:**

**Residential Participants:**

₹ 11,000/- + GST

**Non-residential participants:**

₹ 8,000/- + GST

**FOR REGISTRATION  
CLICK HERE**

**PROGRAM VENUE:**

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

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training venue



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