



2009 Oregon Insurance Division Industry Training Rates and Forms Agenda

MONDAY, October 26, 2009

Life/Annuity Morning Session

7:00 am - 7:30 am	Registration		
7:30 am - 8:00 am	Welcome-Rhonda, Teresa and Triz		
	Life	Health	Time
8:00 am - 8:30 am	Helpful information (Tammy)		30 min
8:30 am - 8:45 am	Advertisements(Rolf)		15 min
8:45 am - 9:00 am	Suitability (Rolf)		15 min
9:00 am - 9:15 am	STOLI, BOLI (David Bolton)		15 min
9:15 am - 9:45 am	Contract SOVs & top 10 objections (David and Rolf)		30 min
9:45 am - 10:15 am	Break In person Registration		30 min
10:15 am - 11:15 am	Rate and Forms intake: Most common objections (Tammy) Life form filings Health form filings Health Rate filings (Mary) Associations(Mary)		60 min
11:15 am - 12:00 am	Associations filing review Life and Health (Rae Taylor)		45 min
	Closing Comments		
12:00 pm - 1:00 pm	Lunch Break		

In person participants can schedule time with staff from Market Surveillance, Consumer Advocacy, Licensing or other Division staff at 350 Winter Street. Please contact Tammy Vance at 503-947-7236 to schedule your appointment. Appointments will be based on Division staff availability.

Health Afternoon Session		
	Health	Time
1:00pm - 1:05pm	Welcome-Rhonda, Teresa and Triz	
1:05pm - 1:55pm	HB 2009 Health Rate filings (Scott and David Ball) Confidentiality (Mitch)	50 min
1:55pm - 2:05pm	Health Advertisements (Carolyn)	10 min
2:05pm - 2:20pm	New legislation (Doreen)	15 min
2:20pm - 2:35pm	NAIC Medigap Model Changes (Maurice)	15 min
2:35pm - 2:55pm	Break	
2:55pm - 3:10pm	Top 10 Objections: Part 1, Contract Language (Doreen)	15 min
3:10pm - 3:30pm	Part 2, Mandates, Exclusions, Limitations (Carolyn)	20 min
3:30pm - 3:50pm	Part 3, Definitions and Terms (Maurice)	20 min
3:50pm - 4:00pm	Closing Comments	

Tuesday, October 27, 2009

Property Casualty Morning Session

Registration		
8:00 am - 8:15 am		
8:15 am - 8:30 am	Welcome-Teresa, Triz (Cece/Rhonda)	
8:30am - 9:00 am	Overview of resources on the web (Tammy & Jan)	30 min
9:00 am - 9:45 am	Most Common Objections at intake (Tammy)- 10 minutes Top Contract Objections - the rest of the team - 35 minutes* (see breakdown)	45 min
9:45 am - 10:00 am	Break	15 min
10:00 am - 10:30 am	New Legislation (Joyce and Cliff))	30 min
10:30 am - 10:40 am	Rate Filing Guidelines (David Dahl)	10 min
10:40 am - 11:10 am	Innovative Product Filings including Green Property & Pay As You Drive (Cece)	30 min
11:10 am - 11:40 am	Credit Scoring and Beyond (David Dahl and Cliff)	30 min
11:40am - 12:10 am	Service Contracts & Vehicle Protection Products (Jan)	30 min
12:10 am - 12:30	Closing Comments/ Wrap Up 20 min	

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Map of Conference Center Location and Floor Plan

