Education Session	Details
Word 2003 to 2007 – Where Are Things Now? *Presented by:* *Sandy Oliver* *AIS Technology*	Have you started working with Word 2007 and been frustrated because you cannot locate familiar features? We will work with Word 2003 and 2007 in side-by-side format and walk through creating a document, from page setup through merging, editing and saving a document on a customer in TAM. Locating familiar features, learning new functionality in Word 2007, and being more comfortable with moving around in 2007 are the primary goals of this class.
Excel – More Than A Spreadsheet *Presented by:* *Sandy Oliver* *AIS Technology*	This hands-on workshop will use Excel 2007 for more than just gathering information into cells. Within Excel 2007 are some specific features to deal with lists of information which Microsoft now calls Tables. This session will cover what the difference is between a table and a range, how to use the various features of tables, use a table in formulas, sort just the table and leave the rest of the worksheet alone and make adding and deleting from a table easy.
E&O Seminar *Presented by:* *Hugh Fardy* *The CG&B Group Inc.*	What do all brokers have in common? We are all exposed to the possibility of Errors and Omissions through our staff, in our workflows and through the process of automation. This two-part seminar covers the A's to Z's of E&O insurance. Understand the possible exposure in your brokerage; learn to identify where the exposure lies and how to take steps to limit the risk. The session includes Risk Management, Binding and Securing Coverage, The Cancellation Process, Customer Contact, Automated Brokerages, Broker Meetings, and The E&O Application and Policy Wording.
Your Inbox Is Not Your Customer Filing Cabinet *Presented by:* *Sandy Oliver* *AIS Technology*	Email is a great way to communicate, but it makes a lousy filing cabinet. For E&O protection, you must "file" your documentation in the proper place for your agency. We will cover some common features within Outlook to help you get control of your inbox, give you tips for cleaning it out, utilize the Rules Wizard, set up flags and get organized and then "file" it in your agency's document management system.
Accounting Utilities *Presented by:* *Paolina Testa* *Applied Systems Canada*	This session will focus on the agency structure, the chart of accounts, the required accounts, the tax setup and the user defined transactions and how they affect the month end and financial statements.
Excel & Retention Sheet *Presented by:* *Leslie Lacroix* *Hub International*	One of the most important pieces of information affecting long term agency profitability and success is the regular tracking of retention information. Yet, in the vast majority of agencies, running this report is the exception rather than the rule. The reason for this is simple. Up until now such reporting has been difficult and time consuming. This class and tool will help eliminate much of this difficulty.

Education Session	Details
Miscellaneous Accounting Topics *Presented by:* *Paolina Testa* *Applied Systems Canada*	Topics include: • Printing receipts for payment types other than cash • Using the PDC tool as a payment receipt register, including cash items with details • Disbursements for EFT accounts • Using Vouchers for DBA • Balancing Payables to GL • Transferring balances from one broker to another • Any accounting topic the attendees would like to question
Preparing For A RIBO Audit *Presented by:* *Michael Buck* *Debbie Lee* *RIBO*	Come hear the experts speak about preparing for a RIBO audit.
System Administrator Utilities *Presented by:* *Jim Vigotty* *Grace/Mayer Insurance Agency*	The IT Admin has a lot to do every day of the week. The object of this session is to demonstrate the tools that make life as an IT admin easier. Regardless if you admin 5 users part-time, or 300 users full-time, the tools shown during this session will benefit attendees by saving time and giving one greater control than native Microsoft methods. Plus, some of the tools let users do things that just aren't available from Microsoft at all! It doesn't matter which Applied system is used. Every attendee always comes away learning something!
Social Networking *Presented by:* *Jim Vigotty* *Grace/Mayer Insurance Agency*	Come and hear about how other insurance brokerages are using Facebook, Twitter, and LinkedIn in their offices.
TAM Reports & Excel Pivot Tables *Presented by:* *Leslie Lacroix* *Hub International*	Attendees should leave this class with an understanding of one of the most useful functions that Excel has to offer to the TAM agency; Pivot Tables. When it's time to really analyze your data, Pivot Tables are an extremely powerful and flexible tool. If you've never used Pivot Tables and you run and analyze data from TAM Reports – This class is an absolute must for you!

Education Session	Details
TAM Tips & Tricks *Presented by:* *Leslie Lacroix* *Hub International*	This collection of tips and tricks will help you operate TAM software each and every day. You will be enlightened by some of the features of TAM that you have either forgotten or never knew; all designed to make you more efficient in your job. This session will also cover a variety of topics including drill downs, filtering and shortcuts to navigate around TAM quickly. Defaults and pre-fills can be used to reduce the amount of typing required. Learn to copy or print customer documents in a jiffy. This is a high-energy fast paced session. You are guaranteed to stay on your toes.
10.4 Benefits Module *Presented by:* *Chris Gory* *Insurance Portfolio Inc.*	This class will show how to use the Group Benefits pieces that were added in TAM in version 10.X.
Update From Applied Systems *Presented by:* *Vince Conroy* *Margaret Flint* *Kim Opheim* *Applied Systems Canada*	This session will cover a number of items. It will take a deeper look into version 10.4. A Canadian support update will also be provided.
Motorcycles & Miscellaneous Vehicles *Presented by:* *Debbie Summers* *Compu-Quote*	Learn about our AutoRater updates, changes and amendments including our new product: Motorcycles and Miscellaneous Vehicles; including trailers, ATV'S and Snow Vehicles available with selected carriers through AutoRater™. • Learn how to utilize the tools provided in AutoRater™ • Be introduced to our newest product: Miscellaneous Vehicles including motorcycles, snow vehicles, ATV’s, campers and trailers • Review the importance of making use of comparative rating services as a means of providing underwriting tips and key insurance solutions for clients • Exclude a vehicle from the application and/or (BMS) business management system