

E&O Risk Management Credit With Swiss Re's Westport Policy

As of 1/1/2020

Credit is applied for two (2) consecutive policy periods.
Credit is NOT removed in the event of a claim

3 hours required

10% Risk Management Credit

Up to 20% Risk Management Credit opportunities: →

- * If the 10% is obtained, these are also available:
- 5% credit if 50% or more staff attend;
 - 5% credit for use of an approved coverage checklist
 - 5% credit for voluntary website Operational Review w/ findings implemented

Attendance requirements are based on staff size:

Insured Agency Staff Size*	Position in Insured Agency	Total Attendees Required
1-4	Active Agency Principal, Owner, Partner, or Officer	1
5 – 11	1 – Active Agency Principal, Owner, Partner, or Officer 2 - Any combination of Producers or CSRs.	3
12+	1 – Active Agency Principal, Owner, Partner, or Officer X - And any combination of Active Agency Principal, Owner, Partner, or Officer, Operations Manager, Producer, or CSRs.	25% of all staff However, no more than a maximum of 15 attendees

*Active Agency Principal, Owner, Partner, or Officer is defined as participating in daily operations of the agency; owners who are investors or have no active participation of the agency are not included.

Upcoming E&O Risk Management Webinars:

You can register online directly at www.wainsurance.org, <https://iiawa.aben.tv/>, If you need assistance, contact Suzanne Arnett at 425 336-0461 or sarnett@wainsurance.org.

Webinars that qualify for the E&O RM credit:

E&O: Roadmap to Cyber & Privacy Insurance, Part 1 Event Time: 7:00AM - 10:00AM CE Units: 3	E&O: Roadmap to Cyber & Privacy Insurance, Part 2 Event Time: 11:00AM - 2:00PM CE Units: 3
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