



Total: 1,395 minutes

Day 1:

8:00 – 9:45 a.m. Welcome and Overview (105 minutes)

This section includes a welcome and Introduction to the course. With an overview of Commercial Surety and how the industry continues to evolve.

9:45 – 10:00 a.m. Break

10:00 a.m. – 12:00 p.m. Intro to Financials (120 minutes)

This section will provide each student with an understanding of how to read a financial statement. Upon completion of this section, the student should be able to identify the parts of a financial statement and understand the terms used within the financial statement.

12:00 p.m. – 1:00 p.m. Lunch

1:00– 3:00 p.m. Financial Statement Analysis (120 minutes)

This section provides each student with an understanding of each component of a financial statement, how a surety underwriter may analyze a financial statement and be capable of basic underwriting calculations.

3:00– 5:00 p.m. Health Care Case Study (120 minutes)

This section will involve a review of a Health Care / Assisted living case study that will allow participants to examine:

- Reclamation Bond
- Utility
- Workers Compensation Bond
- Medicare

Day 2:

8:00 – 11:00 a.m. Probate and Court Bonds

(180 minutes)

This section will include a review of Probate and Court Bonds that will allow participants to examine :

- Probate Bonds
 - Uniform Probate Code – purpose, highlights,
 - that will allow participants to examine Guardianship
 - Conservatorship
 - Personal Representative of the Estate
 - Trusts
 - Other “probate” (read: similar) bonds, such as Power of Attorney, Social Security Administration Representative Payee, and VA Fiduciary.
 - Collection of Bond Premium
 - Cancellation
 - Marketing Strategies
 - Professional Conservators/Trustees
 - Claim Examples
- Civil Court Bonds
 - Definitions
 - Appeal
 - Replevin
 - Temporary Restraining Order/Injunction
 - Receivership
 - Bankruptcy Trustee
 - Underwriting
 - Marketing Strategies
- Wrap Up

11:00 a.m. – 12:00 p.m. Changes & Challenges Commercial Surety Edition (60 minutes)

This section will examine a variety of factors that can have significant impact on the Commercial Surety space, including marketplace, financial sector and the Underwriting attitude/Surety thoughts.

12:00 p.m. – 1:00 p.m. Lunch

1:00– 4:00 p.m. Sub-Division Bonds (180 minutes)

This section will involve a review of one-off single or non-account sub-division bonds as well as mid-large regional account bonds with aggregated liability, examining:

- How to get sub-division bonds underwritten and released
- Financing
- Escrow Deposit Bonds
- Utility Deposit Bonds
- Performance Completion Bonds

4:00 – 5:00 p.m. Customs Bonds (60 minutes)

This section will involve a review of:

- Customs Bond Lingo:
- Bond Types
- How Liability Works
- Distribution Channels
- Case Study
- Q&A and Wrap Up

Day 3:

8:00 – 9:45 a.m. Commercial Contract (105 minutes)

This section will involve a review of commercial contract as well as 4 case studies: Computer Software, Lighting & Stage, Manufacture and Install and Municipal Outsourcing of City Services.

9:45 – 10:00 a.m. Break

10:00 a.m. – 12:00 p.m. Commercial Contract (Cont'd) (120 minutes)

This section is continued from the above content.

12:00 p.m. – 1:00 p.m. Lunch

1:00 – 3:30 p.m. Alternative Energy Bonds (150 minutes)

This section will cover the nuances and idiosyncrasies of surety bonds in the alternative energy space. Participants will learn how bonds are used, common types of bonds, and common issues (and solutions) in renewable energy bonding. Through this dive into alternative energy bonds participants will learn how to help a client or prospect understand their own bonding needs.

- How Are Bounds Used In The Renewable Sector?
- Types of Bonds for Renewable Clients
- Common Issues (And Solutions) In Renewable Energy Bonding

3:30 – 3:45 p.m. Break

3:45 – 5:00 p.m.

Wrap up and Commercial Surety Feud

(75 minutes)

During this lively, interactive session, students – competing in teams – test their knowledge of concepts, terms, and applications introduced during the course. During this activity, the Class will be broken down into 2 teams. A buzzer for each team will be set up. Players from each team will rotate at the buzzer to answer questions. The first to buzz in and answer the question correctly will win the point for their team. If a player answers incorrectly, the other team has the chance to steal with a correct answer and will win the point. The questions will be pulled from the materials that have been covered throughout the class.