

**COLLEGE OF INSURANCE,  
Insurance Institute of India, Mumbai  
Bancassurance for Bankers: Life  
Program ID: CPB2  
(From: 09<sup>th</sup> to 10<sup>th</sup> July, 2018)**

**Relevance of the Program:-**

Bancassurance has come to stay in India, accounting for a fifth of life insurance premiums. With mounting competition and other forces impacting net interest margins [spread], banks are today in search of newer and non-traditional areas of operations, especially relating to fee based activities/ non-fund based activities. Bancassurance is one of those areas that provides great scope for increasing earnings without the menace of NPAs. Again, with India's middle class evolving beyond primary financial needs met by the banking system, financial institutions are today seeking to become one stop financial boutiques that offer end to end solutions for a range of life cycle needs felt by customers. Life Insurance, as a most effective vehicle for risk mitigation and long term financial security, is a vital part of individual portfolios.

The IRDAI regulations provide that a bank [as a corporate agent] may tie up with a maximum of three life insurers, three general insurers and three health insurers for soliciting, procuring and servicing their insurance products. This is to be done through "Specified Persons" who are its employees.

The regulations are expected to have far reaching implications. The onus on the banks, through their specified persons, is much greater to their customers -of providing best advice, rendering service and assistance during the entire period of the insurance contract, including premium payments, claims and other servicing issues.

This Program is designed to enhance the competencies of bank persons who are actively engaged in selling life insurance. It should lead to effectively marketing life insurance products through the bank distribution network, leading on the one hand, to better customer relationships and contribution to customer value by the bank, and building strategic partnerships with the insurer that translate into profitable business opportunities.

**Program Objective:-**

The participant would understand and get insights on

- ✓ Understanding and playing his/her role effectively in the context of the new regulations
- ✓ Prospecting, communicating and connecting with customers in the bank network

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- ✓ Understanding Customer needs and Positioning life insurance in the customers' portfolios
- ✓ Playing an effective role as Primary Underwriter
- ✓ Providing service and building relationships that promote satisfaction and loyalty

**Program Content:-**

The program would focus on the following

- ✓ Life insurance as a financial product - its role in the customer life cycle and positioning in the individual's wealth portfolio
- ✓ Connecting to customers - best practices in understanding customers and building relationships
- ✓ The Specified Person as a Primary Underwriter
- ✓ From prospect to loyal customer – mastering the sales and service process in the bank context
- ✓ The new regulations and what they entail for bancassurance practitioners
- ✓ 'You' are what you sell - insights on Personal branding and personal power

**Participant Profile:-**

Managers / Executives dealing with Bancassurance in Banks.

**Program Duration: - 2 days from 09<sup>th</sup> to 10<sup>th</sup> July, 2018**

**Timing : 10.00 a.m. to 05.00 p.m.**

**Enrolment:**

To enrol for the training program please download the enrolment form and after filling in the necessary details submit your form and fees to the office of the College of Insurance, Insurance Institute of India, Plot C-46, G-Block, Near Dhirubhai Ambani International School, Bandra-Kurla Complex, Bandra (East), Mumbai – 400 051 **by 02<sup>nd</sup> July, 2018.**

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You can also do the enrolment online through the College of Insurance's website [www.coi.org.in](http://www.coi.org.in) on or before **02<sup>nd</sup> July, 2018**

**Course Fees:-**

- a) **Participants requiring residential facilities: Total amount Required –Rs.10148-i.e. (Rs. 8600/- plus 9% CGST and 9% SGST).**

The fees cover tuition, course material, A/C single room accommodation in the Institute's campus and full boarding (bed tea/coffee, breakfast, lunch, light refreshments in the evening and dinner). All rooms are fully furnished with attached bathroom and Internet facility.

Rooms are reserved from 12.00 noon onwards the day prior to the commencement of the program. The participants can stay till 12.00 noon next day after the conclusion of the program.

- b) **Non-residential participants: Total amount Required –Rs. 7316/-i.e. (Rs. 6200/- plus 9% CGST and 9% SGST).**

The fees cover tuition, course material and day boarding (i.e. tea/coffee during tea breaks and lunch for actual days of training).

**Payment Terms and Conditions:-**

- 1) The payment should be received by the College of Insurance before the commencement of the program.
- 2) The confirmation of registration for the program will be subject to the receipt of the payment.
- 3) We do not consider any refund request or adjustment of fees for the next program in case of non attendance.
- 4) Fees should be paid by Demand Draft drawn in favour of "Insurance Institute of India" payable at Mumbai and forward it together with the "Enrolment form" available from College of Insurance's website [www.coi.org.in](http://www.coi.org.in) or by online payment mode following the below link <http://www.coi.org.in/web/guest/program-calender>.

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**Training Venue :-**



**Insurance Institute of India  
(College of Insurance),  
G Block, Plot No. C-46,  
Near American Consulate,  
Bandra Kurla Complex,  
Bandra (E),  
Mumbai – 400051.**



**🚗 Parking Facility:**

**"VEHICLE PARKING IS NOT ALLOWED IN OUR CAMPUS".**

**Course Co-ordinator**

**Dr S Kutty – Tel: 022-26544296**

**Email - [skutty@iii.org.in](mailto:skutty@iii.org.in)**

**Respond to :-**

Ms S S Vaidya	<a href="mailto:college_insurance@iii.org.in">college_insurance@iii.org.in</a>	022-26544266
Ms A P Dalvi		022-26544254
Mr P M Tare		022-26544234

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Nomination Form

- 1) Name: \_\_\_\_\_
- 2) Address: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_
- 3) Educational Qualification: \_\_\_\_\_
- 4) Date of Birth: \_\_\_\_\_
- 5) Position Held.: \_\_\_\_\_
- 6) Mobile No : \_\_\_\_\_
- 7) Telephone No. : \_\_\_\_\_
- 8) Fax No: \_\_\_\_\_
- 9) E-Mail: \_\_\_\_\_
- 10) Alternate E-Mail: \_\_\_\_\_
- 11) Sponsoring Organisation: \_\_\_\_\_
- 12) Food preference:  Vegetarian  Non-Vegetarian
- 13) Hostel Facility Required:  Yes  No
- 14) Details of Fee Paid: Cheque / D.D. No. \_\_\_\_\_ dt. \_\_\_\_\_  
Drawn on \_\_\_\_\_ Bank, for Rs. \_\_\_\_\_

Please  
affix your  
photograph  
here

\_\_\_\_\_  
Signature & seal of the authority  
of the Sponsoring organisation

\_\_\_\_\_  
Signature of the Participant

\*Name of Co-ordinator: \_\_\_\_\_

Mobile No: \_\_\_\_\_ Tel. No.: \_\_\_\_\_

Email-Id.: \_\_\_\_\_ Company Name: \_\_\_\_\_

\*This column is mandatory for those participants who are sponsored by company.