



Massachusetts Association  
of Insurance Agents



# Swiss Re Risk Management

## Swiss Re insureds can earn up to 20% Risk Management Credit on their E&O policy premium!

The E&O Class risk management credit (10% discount) requirements:

- The 3-hour class must be approved by Swiss Re for the credit, which will provide a 10% discount for a 2-year period.
- An agency owner, partner, or officer must be one of the attendees.
- Additional staff will be required, based on your agency's staff size. See the graph below:

Class attendance must be within a year prior to, or 30 days after, your policy effective date.

Total Staff Count	# of Required Attendees
1 – 4	1 owner, partner, or officer
5 – 11	1 owner, partner, or officer & 2 staff members
12+	25% of staff, including one owner, partner, or officer (with a maximum of 15 attendees)

Once the above credit is achieved, you can still earn an additional 5% - 10% discount, by completing one or two of the below, allowing a maximum credit of 20%!

- 5% Credit - Have 50% or more of your staff attend an approved E&O Class.
- 5% Credit - Agency use of a coverage checklist, reviewed by underwriting.
- 5% Credit - Voluntary website review by an approved reviewer with findings implemented.

For qualified classes, [click here](#) and be sure to only select E&O classes that are approved by Swiss Re.

E&O educational opportunities are also provided at MAIA's Annual Big Event Conference in the fall.

### E&O Classes at Your Agency

To arrange for a MAIA instructor to conduct a Swiss Re-approved E&O class at your agency, please contact MAIA Education Director Betty Amaro-White at 508-634-7372 or email [bamarowhite@massagent.com](mailto:bamarowhite@massagent.com).

If you have additional questions, please contact  
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