Professional Liability Insurance Training Course

Professional Development Training Course Outline

Category	Insurance	**Duration**	10 Days
Base Fee	$3,000 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

Professional liability insurance, commonly known as Errors & Omissions (E&O) and Directors & Officers (D&O) insurance, is a critical component of modern risk management strategies. As regulatory pressures, litigation risks, and operational complexities increase, organizations must ensure that professionals and executives are adequately protected from liability claims arising from mismanagement, negligence, or omissions. Training Course on Professional Liability (E&O/D&O) Insurance equips professionals with advanced knowledge of E&O and D&O insurance, bridging the gap between legal exposure and financial protection.

This high-impact course is specifically designed for professionals seeking to gain mastery in underwriting, policy analysis, claims handling, and regulatory compliance for E&O and D&O coverage. With the use of real-world case studies, legal precedent analysis, and interactive tools, participants will build practical skills to navigate complex liability issues. Learn from industry experts and develop a competitive edge in the ever-evolving insurance sector.

Programme Curriculum

Professional Liability Insurance Training Course

Introduction

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Course Objectives

1. Understand the core principles of professional liability insurance.
2. Differentiate between E&O and D&O insurance coverage.
3. Analyze real-time claims management strategies.
4. Identify emerging legal trends impacting liability exposure.
5. Interpret policy wordings and exclusions effectively.
6. Evaluate the impact of corporate governance on D&O liability.
7. Master risk assessment and underwriting techniques.
8. Apply loss control measures to mitigate risks.
9. Understand cyber liability and data breach exposure.
10. Navigate international regulatory compliance requirements.
11. Develop claims investigation and litigation management strategies.
12. Examine insurance fraud detection and prevention.
13. Build actionable skills for client advisory and brokerage roles.

Target Audience

1. Insurance underwriters
2. Risk management professionals
3. Corporate lawyers
4. Compliance officers
5. Insurance brokers and agents
6. Claims adjusters
7. Executives and board members
8. Financial services consultants

Course Duration: 10 days

Course Modules

Module 1: Introduction to Professional Liability Insurance

- Definition and scope of E&O/D&O insurance
- Historical evolution and regulatory background
- Key stakeholders and roles
- Importance in modern business risk strategy
- Types of industries requiring coverage
- **Case Study: Evolution of E&O insurance in the legal industry**

Module 2: Errors & Omissions Insurance Explained

- Understanding negligence and breach of duty
- Coverage components and exclusions
- Who needs E&O coverage?
- Premium factors and rating variables
- Legal doctrines relevant to E&O
- **Case Study: E&O claim against a tech startup**

Module 3: Directors & Officers Liability Insurance

- Role of D&O in corporate governance
- Side A, B, and C coverage explained
- Policy structure and interpretation
- Indemnification and advancement of defense costs

- Emerging risks for board members
- **Case Study: D&O lawsuit in a healthcare company**

Module 4: Policy Wording and Interpretation

- Understanding declarations and definitions
- Exclusions and endorsements
- Common ambiguities and how to resolve them
- Claims-made vs occurrence policies
- Role of legal counsel in interpretation
- **Case Study: Dispute over retroactive date in D&O policy**

Module 5: Risk Assessment and Underwriting

- Risk profiling methods for professionals and firms
- Financial risk indicators
- Industry-specific underwriting guides
- Red flags and rating considerations
- Underwriting in emerging markets
- **Case Study: Underwriting failure in a fintech firm**

Module 6: Claims Management

- Lifecycle of a claim
- Initial reporting and documentation
- Investigation procedures
- Reserving and negotiation
- Settlement strategies
- **Case Study: Denied E&O claim and arbitration outcome**

Module 7: Legal and Regulatory Landscape

- U.S. and international regulations
- Regulatory bodies and oversight
- Role of SEC and FINRA in D&O claims
- Global harmonization of rules
- Jurisdictional issues in international claims
- **Case Study: Cross-border D&O litigation**

Module 8: Corporate Governance and Fiduciary Duty

- Fiduciary responsibilities of directors and officers
- Shareholder activism and litigation
- Whistleblower claims
- Ethics and compliance integration
- ESG and its impact on D&O risks
- **Case Study: Shareholder derivative suit against a board**

Module 9: Cyber Liability and Professional Risks

- Cyber threats facing professionals and executives
- Data breach coverage under E&O/D&O
- Integration with cyber liability policies
- Reputational harm and crisis management
- Risk mitigation best practices
- **Case Study: Data breach lawsuit against a law firm**

Module 10: Insurance Fraud and Prevention

- Types of insurance fraud in E&O/D&O
- Red flags and detection strategies
- Role of forensic auditing
- Technology in fraud detection
- Reporting obligations and legal consequences
- **Case Study: Fraudulent E&O claim by financial advisor**

Module 11: Global Markets and Reinsurance

- Reinsurance in E&O/D&O
- International underwriting considerations
- Cultural/legal challenges across markets
- Lloyd's of London and global placement
- Currency and exchange rate implications
- **Case Study: D&O coverage dispute in the EU**

Module 12: Litigation and Defense Management

- Defense cost coverage
- Panel counsel vs outside counsel
- Litigation strategies and alternative dispute resolution
- Expert witness engagement
- Impact on renewal and future premiums
- **Case Study: High-profile D&O litigation in the banking sector**

Module 13: Emerging Trends in Professional Liability

- AI and automation-related liabilities
- Gig economy and freelance exposure
- Regulatory technology (RegTech) and compliance
- Environmental liability extensions
- Pandemic-related claims
- **Case Study: Post-COVID E&O claims surge in telehealth**

Module 14: Client Advisory and Brokering

- Role of brokers in placement and negotiation
- Client education strategies
- Claims advocacy and service models
- Handling complex risks and renewals
- Building long-term client trust
- **Case Study: Broker-client dispute over inadequate D&O coverage**

Module 15: Final Assessment and Practical Workshop

- Recap of key course components
- Practical risk assessment exercise
- Policy drafting simulation
- Mock claims settlement negotiation
- Q&A and feedback session
- **Case Study: Integrated scenario involving E&O and D&O risks**

Training Methodology

- Interactive instructor-led sessions

- Real-world case studies for experiential learning
- Group discussions and peer knowledge exchange
- Quizzes, simulations, and scenario analysis
- Access to digital reference materials and toolkits

Register as a group from 3 participants for a Discount

Send us an email: info@fineskilltrainingcenter.org or call *+254769199797*

Certification

Upon successful completion of this training, participants will be issued with a globally- recognized certificate.

Tailor-Made Course

We also offer tailor-made courses based on your needs.

Key Notes

a. The participant must be conversant with English.

b. Upon completion of training the participant will be issued with an Authorized Training Certificate

c. Course duration is flexible and the contents can be modified to fit any number of days.

d. The course fee includes facilitation training materials, 2 coffee breaks, buffet lunch and A Certificate upon successful completion of Training.

e. One-year post-training support Consultation and Coaching provided after the course.

f. Payment should be done at least a week before commence of the training, to Fineskill Training Center account, as indicated in the invoice so as to enable us prepare better for you.

Upcoming Scheduled Sessions

Start Date	End Date	Location	Price
23 Nov 2026	04 Dec 2026	Online	$2,000
23 Nov 2026	04 Dec 2026	Physical	$3,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$6,000
23 Nov 2026	04 Dec 2026	Physical	$12,000
23 Nov 2026	04 Dec 2026	Physical	$9,000
23 Nov 2026	04 Dec 2026	Physical	$12,000

Start Date	End Date	Location	Price
23 Nov 2026	04 Dec 2026	Physical	$12,000

Ready to enroll or request a customized program? Book online or contact us:

Register Online Now

Email: info@fineskilltrainingcenter.com | Website: www.fineskilltrainingcenter.com