Professional Liability Underwriting Training Course

Professional Development Training Course Outline

Category	Insurance	**Duration**	5 Days
Base Fee	$1,500 USD	**Delivery Mode**	Online / On-site Hybrid

Course Introduction

In today’s fast-evolving risk landscape, *Professional Liability Underwriting* has become a critical skill for insurance professionals. Errors & Omissions (E&O) and Directors & Officers (D&O) insurance products play a pivotal role in protecting businesses and executives from legal and financial risks stemming from alleged negligence, mismanagement, or failure to perform professional duties. Training Course on Professional Liability (E&O/D&O) Underwriting underwriters, risk analysts, brokers, and insurance professionals with the core and advanced competencies needed to effectively assess, price, and manage professional liability risks using data-driven strategies and regulatory insights.

This training course on E&O/D&O underwriting covers modern tools, claims trends, legal frameworks, and reinsurance strategies through case-based learning and hands-on analysis. By focusing on risk assessment models, policy structuring, and coverage negotiation, the course prepares professionals to handle complex liability exposures in diverse industries such as finance, healthcare, and technology.

Programme Curriculum

Professional Liability Underwriting Training Course

Introduction

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and coverage negotiation, the course prepares professionals to handle complex liability exposures in diverse industries such as finance, healthcare, and technology.

Course Objectives

1. Understand the fundamentals of E&O and D&O insurance underwriting
2. Analyze emerging professional liability risks across global markets
3. Identify and assess legal liability exposures in various sectors
4. Develop customized underwriting solutions for complex risks
5. Evaluate policy wording and exclusions in E&O/D&O contracts
6. Apply data analytics in underwriting decision-making
7. Navigate regulatory and compliance requirements
8. Integrate cyber and ESG risk considerations into liability underwriting
9. Use AI-powered risk assessment tools for smarter underwriting
10. Manage claims scenarios and litigation trends effectively
11. Conduct underwriting audits and monitor performance indicators
12. Explore reinsurance solutions and treaty structuring
13. Design profitability-driven underwriting strategies

Target Audiences

1. Insurance Underwriters
2. Risk Managers
3. Insurance Brokers
4. Corporate Legal Advisors
5. Claims Adjusters
6. Compliance Officers
7. Actuarial Analysts
8. Reinsurance Professionals

Course Duration: 5 days

Course Modules

Module 1: Introduction to Professional Liability Insurance

- Definition and scope of E&O and D&O
- Historical evolution and market dynamics
- Key differences: E&O vs. D&O
- Understanding insureds and third-party claimants
- Importance of professional liability in corporate governance
- **Case Study**: E&O claim in a tech consulting firm

Module 2: Legal and Regulatory Framework

- Domestic and international regulations
- Compliance obligations for insurers and insureds
- Legal trends in professional liability
- Case law impacting underwriting decisions
- Understanding SEC and FINRA implications in D&O
- **Case Study**: SEC lawsuit against corporate directors

Module 3: Risk Assessment and Underwriting Criteria

- Identifying insurable professional risks

- Risk scoring and segmentation
- Industry-specific risk factors
- Financial due diligence and background checks
- Risk appetite framework development
- **Case Study**: High-risk underwriting in healthcare

Module 4: Policy Design and Coverage Structuring

- Standard vs. customized policy forms
- Key coverage terms and exclusions
- Policy limits, retention, and co-insurance
- Endorsements and policy extensions
- Tailoring terms to client needs
- **Case Study**: Policy wording dispute resolution

Module 5: Claims Handling and Litigation Trends

- Claims notification and assessment
- Role of defense costs and settlements
- Reserving practices and actuarial support
- Common litigation pitfalls in D&O
- Trends in class-action suits and legal costs
- **Case Study**: Defense cost allocation in D&O claim

Module 6: Cyber and ESG Considerations in E&O/D&O

- Interplay between cyber liability and E&O
- ESG-related exposures for boards and professionals
- Assessing sustainability and reputational risks
- Climate-related disclosures and liability implications
- Integrating cyber/ESG metrics in underwriting
- **Case Study**: ESG lawsuit against a financial firm

Module 7: Data Analytics and AI in Underwriting

- Using AI to evaluate historical claims data
- Predictive modeling and automated risk scoring
- Machine learning in portfolio management
- Leveraging external data sources (e.g., social media, news)
- Reducing subjectivity with data-driven decisions
- **Case Study**: AI-based underwriting success in fintech

Module 8: Reinsurance and Portfolio Strategy

- Types of reinsurance applicable to E&O/D&O
- Structuring proportional and non-proportional treaties
- Portfolio diversification strategies
- Managing accumulations and catastrophic exposures
- Monitoring portfolio KPIs and profit metrics
- **Case Study**: Reinsurance treaty for a multinational insurer

Training Methodology

- Interactive lectures and expert-led discussions
- Case study analysis and simulation exercises
- Scenario-based group activities

- Underwriting template and toolkits
- Quizzes and practical assignments

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	27 Nov 2026	Online	$1,000
23 Nov 2026	27 Nov 2026	Physical	$1,500
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$3,000
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$4,500
23 Nov 2026	27 Nov 2026	Physical	$6,000
23 Nov 2026	27 Nov 2026	Physical	$6,000

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

Register Online Now

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