

Guidelines for Broker-Delivered Workshops



To help you serve your clients, we have developed five workshops you can deliver to your Berkley DP policyholders. Your workshop attendees will earn AIA/CES Learning Units (LUs) and Professional Development Hours (PDHs). Because they are Berkley DP–authored programs, these workshops will also qualify your clients for a 15% risk management education rating credit.*

Selecting a Program

Contact Jeannette Vaccarezza (jvaccarezza@berkeleydp.com or 831.293.6248) to receive a PDF of the speaker’s-notes version of any presentation you are interested in delivering. View the most current catalog on the BDP Risk LMS.

Guidelines for Delivery

Once you’ve selected a program for delivery, please follow these guidelines to ensure that your clients qualify for the 15% risk management education credit*

1. Advise Jeannette Vaccarezza:
 - a. Berkley DP–insured firm name
 - b. Program selected
 - c. Scheduled date of delivery
2. In return, you’ll receive:
 - a. AIA Speaker Agreement (which you will need to sign and return)
 - b. Customized PowerPoint presentation with the client’s name, presentation date, agency logo, and your contact information. There will also be an editable slide to include a brief bio or more information about your agency
 - c. Two-slides-per-page handout (PDF) of the customized presentation
 - d. Customized, fillable sign-in sheet (Word)

Learning Units

Are as easy as 1-2-3!

1. Return the completed sign-in sheet (which includes space for AIA membership numbers, if applicable)
2. Certificates of Completion will be available on the BDP Risk LMS for all attendees, showing both AIA CES LUs and PDHs
3. We will report learning units to the AIA for members (engineers can, in general, use Certificates of Completion to self-report)



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Risk Management Education Credit

Qualifying for the Credit

Firms that participate in one or more Berkley DP–authored education programs qualify for a single 15% risk management education credit, which will be reflected in the rating for the firm’s next policy quotation.

Workshop Attendance

We encourage principal, professional and project manager participation, but we *do not* specify minimum attendance requirements.

One participant from a firm at a single education event qualifies the firm for credit.

We do NOT specify minimum attendance requirements

Other Important Notes

We do not “bank” credits for additional program participation to future policy quotations.

In addition, the premium credit opportunity applies only to primary policies; excess policies are not eligible for this credit.

Got Questions?

Please reach out to us:

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** Each policy year, firms that participate in one or more Berkley DP education programs qualify for a single 15% risk management education credit that will be included in rating and reflected in the firm’s next policy quotation. Please note that the rating credit opportunity applies only to primary policies; excess policies are not eligible.*

About Berkley Design Professional

Berkley Design Professional was started in 2013 by a team of people with deep roots in underwriting, loss prevention and claims handling for the Design Professional community. The genesis of Berkley DP was the combination of our team's passion for bringing fresh ideas to the products and services Design Professionals need together with W. R. Berkley Corporation's desire to commit its superior financial strength and A+ rated paper to this industry segment. Berkley DP's motto is: "Better by Design." By this we mean that our policyholders are better businesses because we've designed comprehensive coverage and current risk management solutions that make their practice less susceptible to loss.

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Practice management recommendations should be carefully reviewed and adapted for the particular project requirements, firm standards and protocols established by the design professional.

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