

**IVAN E. COHEN, RF, ARM, CRM, CIC, AIC, AAI, MLIS, CRIS**  
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**PROFESSIONAL DESIGNATIONS**

Fellow - Risk and Insurance Management Society (RF)  
Associate in Risk Management (ARM)  
Certified Risk Manager (CRM)  
Certified Insurance Counselor (CIC)  
Associate in Claims (AIC)  
Accredited Advisor in Insurance (AAI)  
Management Liability Insurance Specialist (MLIS)  
Construction Risk and Insurance Specialist (CRIS)  
Registered Professional Liability Underwriter (RPLU)-Candidate

**EDUCATION**

BBA-Finance: Iona College: Hagan School of Business 1977  
AAS- Management: Westchester Community College 1975

**PROFESSIONAL LICENSES**

New York State Insurance Agent-Property, Casualty, Life & Health  
New York State Insurance Broker-Property, Casualty, Life & Health  
New York Excess Line Broker  
New Jersey Producer- Property, Casualty, Personal Lines, Life, Accident & Health  
Connecticut Producer- Property, Casualty, Life & Health

**PROFESSIONAL EXPERIENCE**

1979- Present: President: The Cohen-Putnam Agency, Ltd.  
Insurance Agents, Brokers & Consultants

1998-Present: President: Insurance Education Corporation

- Insurance Continuing Education Provider  
Approved in: NY, NJ, CT, MA, NH, VT
- Litigation Consultant/Expert Witness

1977-1979: Account Executive, Connecticut General Life Insurance

**ACADEMIC APPOINTMENTS**

1980-1993 Senior Adjunct Professor-Insurance  
Curriculum Advisory Board Member in Banking, Insurance and Real Estate  
Westchester Community College

**PROFESSIONAL APPOINTMENTS**

**Current**

Subject Matter Expert: New York State Department of Financial Services  
Insurance Exam Review Committee

Subject Matter Expert: Prometric- National Insurance Test Development

**Past**

Professional Insurance Agents of New York  
Education Committee  
Industry Liaison Committee  
Government Affairs Committee  
State Board of Directors

Independent Insurance Agents and Brokers of New York  
Education Committee  
Technical Advisory Committee

Putnam County Independent Insurance Agents- Past President

**PROFESSIONAL SOCIETY AFFILIATIONS (Current)**

Professional Insurance Agents of New York  
Independent Agents and Brokers of New York  
Society of Certified Insurance Counselors  
Society of Certified Risk Managers  
Risk and Insurance Management Society  
Global Risk Management Institute  
Excess Lines Association of New York

**PROFESSIONAL PRESENTATIONS**

Professional Insurance Agents of New York  
Professional Insurance Agents of Connecticut  
Professional Insurance Agents of New Jersey  
Independent Insurance Agents of New York-Accredited Advisor Insurance Designation  
Risk and Insurance Management Society  
Society of Certified Insurance Counselors- CIC Designation  
Society of Certified Insurance Service Representatives- CISR Designation  
Massachusetts Association of Public Insurance Adjusters  
New Jersey State Bar Association/NJ Institute for Continuing Legal Education

**PRESENTATION SUBJECT MATTER (Partial Listing)**

Errors & Omissions Prevention for Agents & Brokers  
Excess Liability & Umbrella Coverage  
Understanding Claims-Made vs. Occurrence Forms  
Professional Liability  
Essentials of Liability and the Commercial General Liability Policy  
Elements of Contracts, Insurance and Contractual Liability  
Insurance Law, Regulations and Ethics  
Risk Management for the Insurance Professional  
The Insurance Contract  
Personal Lines Coverage  
Commercial Lines Coverage  
Personal and Commercial Property Coverage

**PUBLICATIONS AND WEBINARS**

**National Webinar:** “Insurance Agents and Brokers: Standard of Care”  
Technical Advisory Services for Attorneys (TASA)  
November 12, 2015

**Presentation:** Belt and Suspenders: Understanding the Complexities, Interactions and Pitfalls of Contractual Risk Transfer and Additional Insured Status  
New Jersey State Bar Association/NJ Institute for Continuing Legal Education. November 30, 2017  
Ivan E. Cohen & Thomas Licata, Esq.

**Publications:** “Workers Compensation-A Multi-State Conundrum”  
Risk Management Magazine  
Risk and Insurance Management Society  
September 1, 2019

“The Potential Risks of Risk Management Services”  
Insurance and Risk Management Knowledge Alliance  
The National Alliance for Insurance Education and Research  
November 9, 2015

“What’s in a Name?”  
Risk Management Magazine  
Risk and Insurance Management Society  
October 1, 2013

“The Limitations of Certificates of Insurance”  
Risk Management Magazine  
Risk and Insurance Management Society  
September 1, 2013

“Use your Web site to help manage E&O exposure”  
Ivan E. Cohen, CRM, CIC, AAI, CRIS, CPIA / Alan Goldstein MBA  
Professional Insurance Agents  
September 2009

**Litigation Consulting/Expert Witness:** State, Federal and Canadian Courts  
Deposition Testimony: 6  
Trial Testimony: 4