



Syllabus for Continuing Education Program

Program Provider: NAIFA - Minnesota
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Event: Lunch & CE

Title: Top Cyber Secrets to Protecting Agencies from their #1 Financial Risk

Presenter: Daniel Metcalf, Partner, CyberFin

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Date: Thursday, April 4, 2024

Location: Midland Hills Country Club, 2001 Fulham Street, Roseville, MN 55113

Time: 11:30 AM Attendee arrival

12:00 PM Lunch served

12:15 PM Welcome and announcements

12:30 PM CE Presentation

1:30 PM Meeting ends

Attendance Fees: All Attendees: \$25

Sponsors: Per benefit package

Refunds: No refunds for cancellations received after 3/28/2024 or for no show attendees.

CE Credits: This educational offering is PENDING by the Minnesota Commissioner of Commerce as satisfying one hour of STANDARD classroom credit toward continuing insurance education requirements.

CFP: 1.0-hour Standard credit APPROVED.

CLE: 1.0-hour Standard credit APPROVED.

A certificate of attendance is available for individuals requesting CPE and PRP (Professional Recertification Program – formerly PACE) credits.

Who Should Attend: Estate planners, financial planners, investment advisors, insurance producers, retirement counselors, CPAs and JDs

Level of Educational Complexity: Overview

NAIFA-Minnesota

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Course Description

The largest financial risk to an insurance agency in 2024 according to Allianz's recent risk study is Cyber Crime. The attacks are getting more complicated and the with more frequency than in the history of cyber- crime. In that same time, the technology and tools are drowning business leaders in features and starving them for benefits. During our time, we'll look at the top cyber-crimes in the industry today, how they are impacting you and your customers, and the top cyber secrets to severely lower the risk of an attack and the overall impact of a breach.

Learning Objectives

1. Attendee will get an understanding of the financial impact of not addressing cyber crimes
2. Attendee will learn how cyber-crime has changed in 2024 and how to spot them
3. Attendee will learn what Not To Do when trying to protect themselves or customers from cyber crimes
4. Attendee will learn Top Cyber Secrets to lowering their risk of an attack and the impact if/when one occurs

Outline

1. **Introduction: (5 minutes)**
 - a. How big is it, really?
 - b. How did we get here?
 - c. Today's objectives with my background
2. **The top cyber-crimes today (10 minutes)**
 - a. How to spot it
 - b. How it's executed
 - c. What's the brass tax?
3. **What Not To-Do: (15 minutes)**
 - a. The Not to do lists
 - b. A few scary stories
4. **The 3 best practices to severely lower your risk and the impact of a cyber breach (15 minutes)**
 - a. The new way to look at cyber security for your company
 - i. User based layered security
 - b. The two main requirements for meeting cyber guidelines
 - c. Create a less attractive organization to cyber criminals
5. **Questions (5 minutes)**

Instructional Materials for Registered Attendees: Handouts if any will be included in the confirmation email to registered attendees. **Examination & Answers:** No exam



About the Speaker:

Daniel Metcalf is the self-proclaimed "Geek" at CyberFin. He loves to solve business challenges with technology. With 20 years' experience in the tech space and the last 7 years providing cyber services to Financial Services organizations and their customers, Daniel knows the importance of cyber security protection. Daniel says he has the best job at the company, combining his passion for technology and education in his quest to eliminate cybercrimes and regulation

fines in the SMB space.