



# INSURANCE AND FINANCIAL EDUCATION CLASSES

## OREGON DIVISION OF FINANCIAL REGULATION

### Home insurance

Learn the ins and outs of homeowners insurance. This one-hour workshop is for first-time homebuyers and people who want to learn about homeowners insurance.

### Renters insurance

Learn why renters insurance may be important for your financial well-being. Review the comparison shopping tool to help get the best coverage for your needs.

### Disaster preparedness

Learn how to get your insurance and finances ready for a disaster. Review six simple tips to financial preparedness. This one-hour workshop is for people who want to prepare for disasters.

### Auto insurance

Auto insurance is required in Oregon. Learn what coverages you need and the options you can choose when buying auto insurance. This one-hour workshop is for newly licensed drivers and current and future car owners.

### Risk management for small businesses

Small businesses manage risk every day. Learn about the types of insurance a business can use to safeguard itself from accidents and disasters. This 30-minute workshop is for current and future small business owners. It can also be combined with scam prevention or risk management for small businesses.

### Managing your finances

Getting control of your money is a powerful way to achieve your financial goals. Learn about tools to track spending, set goals, and stick to a budget. This 90-minute workshop is for people looking to become more financially resilient.

### Protecting your finances

There are several banking services that can help protect your money, build your credit, and achieve your financial goals. This one-hour workshop is for people who want to make the most of their banking relationship, avoid fees, and maximize their financial stability.

### Loans and debt help

Dealing with debt and lenders can be stressful. Learn how to talk to a creditor, and learn about your rights when dealing with a debt management service provider or debt collector. This 90-minute class is for people who want to reduce their stress caused by debt. It is also for financial education providers and coaches.





## Financial fraud prevention

Scammers are everywhere, and everyone is a target. Learn how to spot a scam, protect your information, and report fraud. This one-hour class is for people who want to protect their personal and financial information and avoid scams. It is also for financial education providers or coaches.

## Senior Safe

Oregon's Senior Safe Act makes securities professionals mandatory reporters for suspected elder financial

exploitation. This four-hour class is for securities professionals, such as broker-dealers and investment advisors, and can qualify for up to three continuing education credits.

## Data breach in businesses

The Oregon Identity Theft Protection Act details the responsibilities businesses have to protect the personal data of their customers and the steps to take if a data breach occurs. This 30-minute class is for small businesses. It can also be combined with scam prevention or risk management for small businesses.

## Agent training

What makes a good agent? Learn about the Division of Financial Regulation and what it views as good characteristics of insurance agents. This class includes real-life examples and plenty of participant interaction. It is a three-hour class for new agents and professionals wanting a refresher. Attendance qualifies for three continuing education units.

For more information contact:  
[outreach.dfr@dcbs.oregon.gov](mailto:outreach.dfr@dcbs.oregon.gov)

## Understanding credit

Credit reports and scores are being used more often. Lenders, landlords, service providers, and even potential employers will look at your credit report as part of their review process. Learn to read a report, understand what influences your score, and make a plan to manage and protect your credit profile. This two-hour class is for people who want to understand, protect, and improve their credit. It is best taught as two one-hour sessions to enable participants to get their credit report between classes.

## Securities and investments

Retirement security relies on being able to successfully navigate the world of investments. Learn how to choose a financial advisor, get tips to work with your financial advisor, and find out how to avoid investment scams and fraud. This one-hour class is for people who want to choose an investment advisor.



Department of Consumer  
and Business Services

440-5582 (COM/8/21)