



Sircon® Solutions

For Agencies



Vertafore®

“We came to Vertafore with a handful of ‘must haves’ in mind. What we weren’t expecting was a vendor that took the time to learn our business. Vertafore came away understanding our unique challenges and didn’t just suggest a one-size-fits-all product. Instead, they came to the table with flexible solutions that met our needs... and that was huge for us.”

 **Angela Ford**, *Director of Applications, Beecher Carlson*



Back to Business

Successful firms are committed to growing their business and insist on hard-dollar savings. We're all more cost-conscious, waste-conscious, and increasingly focused on the bottom line—and rightfully so.

Keeping your producers authorized to sell business is not typically a revenue-generating activity, but it can certainly impact your bottom line. Being out of compliance can trigger audits and fines. Without proper credentials from states and carriers, books of business can be rejected or simply never be paid.

Historically, firms have attempted to manage licensing and compliance with multiple systems that didn't integrate—or even worse, had no system at all. Both scenarios lead to additional manual intervention creating more work than was necessary and huge headaches for agencies.

That's where we fit in.

At Vertafore, we believe that less is more. Less time spent juggling administrative tasks, less time wasted on manual data entry, and less staff devoted to keeping a firm's agents properly credentialed means more time to focus on what really matters—your business.



Vertafore's Sircon solutions are the most advanced, intuitive, and hands-off licensing compliance and producer data management options available. They provide integrated access to your producer data and allow you to track important producer information, like continuing education and demographic changes, to improve what we've coined "producer lifecycle management."

Producer Lifecycle Management

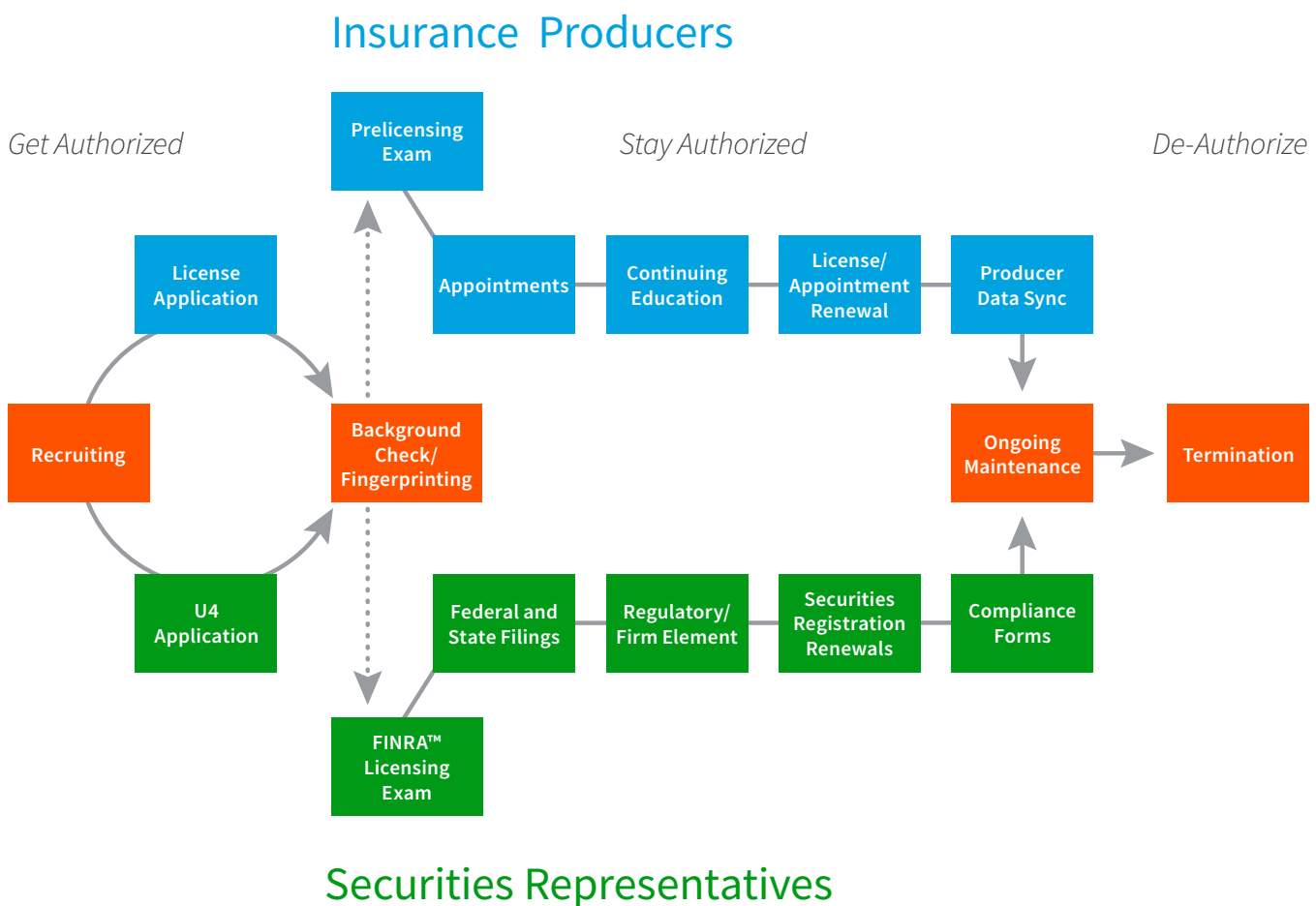
Complete, connected, and compliant solutions designed to get and keep your agents selling.

Producer lifecycle management refers to all the activities required to get, and keep, your producers authorized to sell insurance. Keeping producers authorized involves not only meeting regulatory requirements, but also knowing the correct combination of license, education, and contracts that a producer needs in each individual state.

Our Sircon solutions simplify and accelerate producer lifecycle management by automating the tasks required to achieve and maintain sales authorization throughout the lifecycle of a producer's career.

Our vision is to empower the insurance industry to improve business efficiency by simplifying and accelerating producer sales authorization; and to make better, faster business decisions based on increased visibility into sales channels. Sircon solutions automate repetitive tasks and are flexible enough to grow with your business without requiring additional staff.

It is the choice of agencies large and small, from property and casualty to life and health to annuity and securities. We think it will be your choice too.



Flexible. Proven. Easy.

And ready when you are.

Sircon solutions deliver 100% paperless producer lifecycle management. We built our business on providing flexible automation services that shorten processing times with states and carriers—all to accelerate your time-to-revenue and ensure your commissions get paid.

Our services enable you to access licensing and other important compliance services in all states from one secure online location, instead of visiting 50 separate state websites. We simplify complex insurance compliance management and get you back to the most important tasks of all: selling and servicing business.

We save you time so that you save money and reach your revenue goals faster. Compliance? Easy.



Solutions to match your needs.

Simple License Management

- License applications and renewals made easy
- Connected agent license management
- Compliance peace of mind

AgencyEDGE

Enterprise Level Credential and Relationship Management

- Achieve enterprise level insight
- Never doubt your data again
- Remove sales bottle necks
- Have regulatory information on hand for audits
- Unmatched regulatory support

Producer Manager

Full Service Solutions

- Flexible outsourcing options
- Support for special projects
- Consulting from industry experts

**Licensing
& Registration
Services**

Simple License Management

AgencyEDGE

With AgencyEDGE, automating your licensing and compliance, you can:

- Confirm your agent licensing and demographic information easily and without ever having to leave your Sircon platform
- Get your agents credentialed and selling faster with accelerated processing
- Easily determine agent CE status and find CE courses your agents need to take for ongoing compliance
- Receive reminders when your agents' licenses need to be renewed or when their application status changes with the state
- Allocate associated compliance fees to cost centers

License Applications and Renewals Made Easy

Managing producer and agency licenses is not easy, especially when you factor in the daily regulatory changes. Manual look-ups to verify producer licensure and tracking those licenses in spreadsheets is not enough because constant changes make your data quickly out of date. Sircon AgencyEDGE is an online, single-source platform, which allows you to easily perform license applications and renewals at the right time, in any jurisdiction. And when you manage these transactions, you can even streamline your payment processing with one monthly billing statement.

Connected Agent License Management

Have you heard the term “Sircon Connected”? With AgencyEDGE you can connect to your producers, providing you and each producer with direct insight into the producer's licenses, lines of authority, and continuing education information. Those credentials are automatically updated with information from the PDB and state departments of insurance, so you'll always know when and where your producers are authorized to sell. Can you confidently say that all of your producer's data is up to date? Now you can with AgencyEDGE.

Compliance Piece of Mind

AgencyEDGE gives you direct access to the National Producer Database (PDB), enabling you to automatically populate your applications with the most up-to-date information. Even better yet— receive timely reminders when your producer's licenses need to be renewed. And with AgencyEDGE, you also have access to all the most current regulatory information via quick reference guides to help you proactively monitor change and view a state by state list of producer requirements all in one location.

Enterprise Level Credential and Relationship Management

Producer Manager

Achieve enterprise-level insight

Gain insight into information that can drive marketing and sales strategies. Ensure that the right producers are available to sell the right products at the right time to support agency sales goals. Address problem areas and proactively respond to business and market events with access to statistics on authorization requests by product type, state, authorization result, and error condition.

Never doubt your data again

Supply downstream systems with data automatically pulled from the National Producer Database (PDB) and eliminate manual data entry.

Remove sales bottlenecks

Reduce costs and decrease time-to-revenue by ensuring that business booked will be paid. Meet complex state and carrier rules and reduce the risk of errors and violations. Apply consistent processes to ever-changing authorization rules. Eliminate manual processing of routine tasks and focus on exceptions. Determine at a glance if producers are legal to sell at the product level, with state-based product authorizations that check licenses and lines of authority.

Have regulatory information on hand for audits

During an audit, states can ask you for a single producer's records from a policy sold years before you were even managing your agency's producer licenses. If your agency doesn't have that record, you're at risk for audit failure, hefty audit fines, and even reputation damage. Producer Manager houses and maintains producer records including licenses, lines of authority, and carrier appointment information so you have the right data at the right time.

Unmatched regulatory support

Our unmatched support will add to your peace of mind because our industry-leading analysts stay on top of regulatory changes, so you don't have to. When regulations change, we will not only notify you, but our expert development team will incorporate changes right into the products, which will walk you through all the steps you need to take in any given state to achieve and maintain sales authorization.

With Producer Manager automating your producer credential management, you can:

- Instantly determine which of your producers are authorized to sell which products, in which state, for which carrier
- Save time and eliminate manual data entry by automating producer data synchronizations with the National Producer Database (PDB), decreasing time-to-revenue
- Leverage trusted PDB data to feed downstream systems and eliminate manual data entry via data synchronization
- Connect with other in-house systems and eliminate manual data entry
- Answer the question, "Does this producer have the right licenses and lines of authority to book this piece of business?"
- Assist licensing specialists with the processes needed to correct authorization failures and turn a "no" into a "yes"
- Facilitate licensing services staff and producers working together to support agency sales goals

Full Service Solutions

Licensing and Registration Services

Understanding how to onboard and keep your producers authorized to sell takes substantial expertise. The complexities of the process mean greater risks to your business and reputation, only increasing the cost of that expertise. That's why Vertafore offers Licensing and Registration Services (LRS), a business process outsourcing option powered by industry best practices and our cutting edge technology. LRS allows your staff to focus on supporting your customers, while we take care of everything else.

Support for Special Projects

Have you recently been through a merger or acquisition? Are you starting to work with new carriers? Are you starting to sell new lines of insurance? The expert team at Vertafore offers short-term assistance with these and other compliance related projects. Let us manage these time-consuming and paper-intensive projects for you, so you can focus on what you do best.

Consulting from Industry Experts

With best-practice compliance improvement you gain experience and insight from Vertafore experts. We work together with your in-house compliance team to find a solution to your licensing and registration-related issues. Best-practice engagements are tailored to address your specific compliance situation and needs, and are guided by a three-step process methodology: Discovery, Analysis, and Recommendations. Through this approach you can expect dramatic improvements in your compliance operation.

Flexible Outsourcing Options

Our LRS experts know what it takes to get and keep your sales staff authorized to sell. That's why we've created the Get Authorized and Stay Authorized service packages, specifically designed to meet your agency's producer authorization-management-processing needs. You can even customize a package that meets your unique needs.

Get Authorized

- Resident and non-resident licensing
- Background investigations
- Affiliations
- Contracting
- And more

Stay Authorized

- Continuing education tracking
- License renewals
- Name and address changes
- Producer reconciliations
- Terminations
- And more

No matter what you choose, you can rely on the expertise of a company that has been leading licensing and compliance initiatives for over 20 years.

“Vertafore’s [Sircon solutions] capabilities made their product the easy choice, but it’s their people that give them the winning edge. While we think the world of their product, their staff turned us into true believers.”



Lynn Bischak, *Licensing Administrator, Neace Lukens*



Sircon Solutions

With Growth in Mind

“One size” has never “fit all” agencies, brokers, or MGAs. While other providers may try to force heavy-weight systems onto small firms or offer big firms systems that just can’t meet their needs, we take the time to learn about your business so that your Sircon solution can be tailored to your needs.

We developed Sircon services to scale as you grow with flexible options that provide additional capabilities only when you need them. When you are ready to move to a more robust edition, or expand the set of our services used, our experienced agency team can help guide you through that process.

The Peace of Mind that Comes From a True Partnership

Since 1997, we have partnered with state regulators, carriers, CE providers, individual producers, agencies, and broker-dealers through our industry-leading Sircon solutions. Our focus is, and has always been, connecting each of these industry stakeholders electronically, making communication faster and easier. Because we serve each of these stakeholders simultaneously, we are uniquely positioned to serve each individual better than anyone else in the industry. For you, this means partnering with a provider that has the background, know-how, and the full-picture vision to help you achieve your goals.





We understand that your business is different. Having served more than 20,000 businesses, we know that no two companies are ever completely alike, so we take the time to learn about yours before talking too much about ours.

For more information on Sircon solutions for agencies, please visit sircon.com or call us at 877.876.4430.



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