

A Digital Solution for Insurance Agent Licensing Compliance Management

As the insurance industry undergoes a transformation emphasizing digital product distribution and automated underwriting, the paper-based process of agent licensing and appointment tracking can also be transformed.

STREAMLINE YOUR PROCESS WITH ACCLAIM



ADDRESSES THE CHALLENGES OF AGENT CONTRACTING AND APPOINTMENTS

- Agent onboarding
- License tracking
- Compliance



SECURE MAINTAINENCE

- Easy to navigate user dashboard
- Agent appointments
- Licensing records and important documents (W-9, E&O) securely housed



TOOLS AND ALERTS TO MEET COMPLIANCE REQUIREMENTS

- Agent portal
- License expiration alerts
- Self-service renewals
- Automated agent appointment forms completion
- Extensive search and reporting capability



THIRD PARTY INTEGRATION

- Digital capability to enable transmission of agent information to authorized third parties (such as background and OFAC screenings)
- Functionality to accept third party data feeds to update agent records
- NIPR integration

AGENT ONBOARDING PROCESS

Agent receives a branded email invitation to onboard

Agent authenticates with pre-selected identifying information

Demographic information, licensing data and banking information collected

Specific carrier appointment questions, contracts and other requirements presented

Acknowledgments and signatures collected digitally

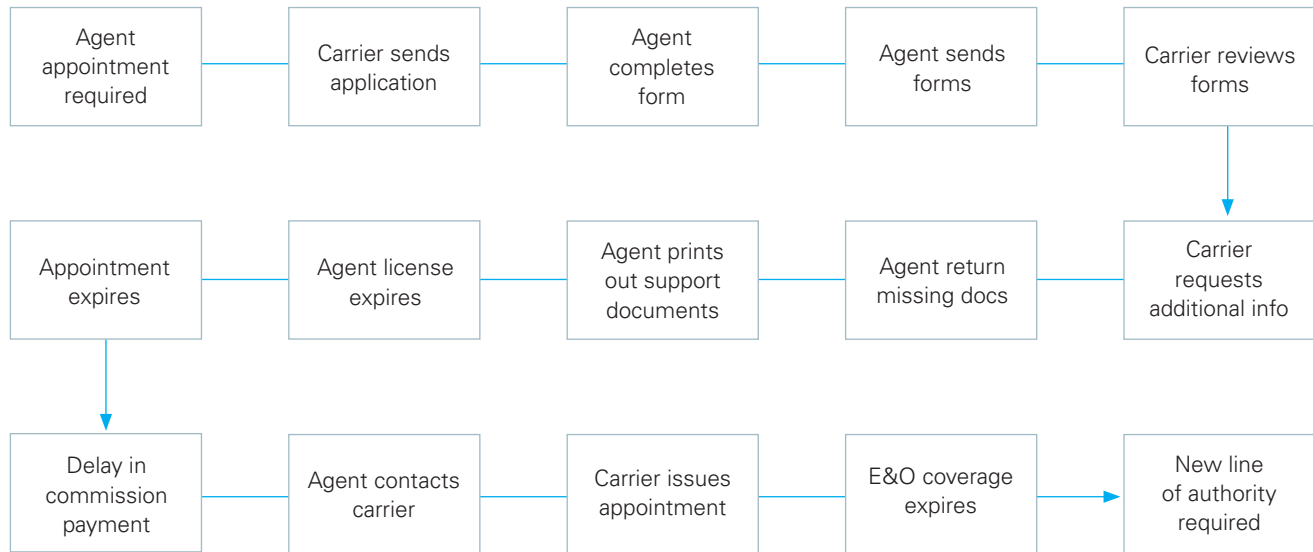
Appointment application data stored and ready for decision

Call today to learn more at 203-446-8123, or visit www.acclaimiq.com.

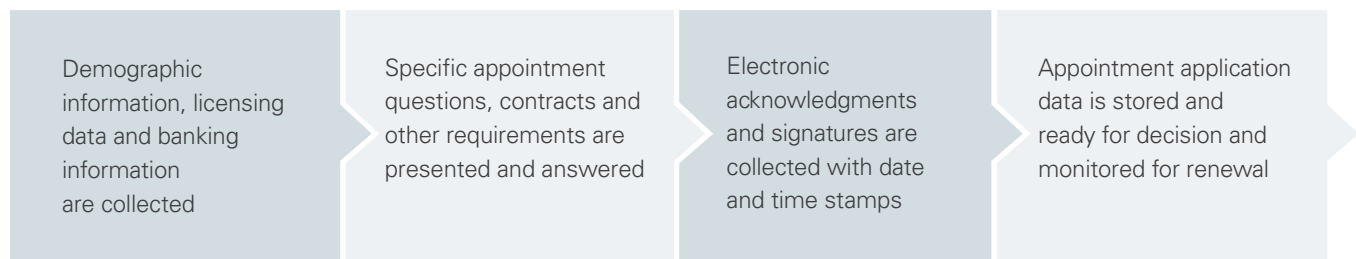


Take the Paperwork out of Insurance Agent Appointment and License Tracking

Agent onboarding, appointment tracking, license validation, lines of authority and E&O coverage verification are time consuming, paper laden processes.



With **ACCLAIM** you can automate the process and maintain a completely digital platform for insurance agent licensing, appointments and continuing education.



THE PERFECT SOLUTION FOR:

- Agencies with multiple agents
- Agencies/Carriers offering multiple product lines
- Carriers with multi-agent distribution
- Insurance professionals ready to reduce the use of paper-based processes

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ACCLAIM
Digital Licensing Compliance Management

Agent Carrier Contracting Licensing Appointment Interface Module