

Sircon Managed Services

Lose the work, gain efficiencies.

Sircon Managed Services is a comprehensive solution for outsourcing licensing, compliance, and registration operations. Whether you're navigating a recent acquisition or seeking a reliable long-term solution, Sircon can manage your regulatory management needs to the highest industry quality. Our proven expertise provides the peace of mind to focus on the core of your business.

The Vertafore advantage

With us, you get:

- A team of skilled professionals to outsource to and solely focused on your compliance needs
- Comprehensive carrier, agency, producer and adjuster compliance services
 - License applications
 - License renewals
 - Continuing education (CE)
 - Appointments, relationship management, and terminations
 - Onboarding
 - and more!
- The benefit of our proprietary credential management technology
- Regulatory expertise and support at your fingertips

Experience you can count on, quality you can trust

Our trusted expertise and industry best practices has made Sircon a reliable choice for compliance management for the last 35 years. Keep your producers compliant with more speed and less errors with a comprehensive outsourcing solution.

Key benefits

Speed to revenue

- Reduce the time and cost to manage licensing for new and veteran producers
- Faster processing time for onboarding, appointments, and renewals means quicker revenue generation

Improved compliance quality

- Sircon's industry best practices and consistent operational excellence reduces your risk of non-compliance, saving money on potential fines and fees
- Never miss another change or deadline with real-time notifications and state regulatory monitoring

Outsourcing is a strategic advantage

- Outsourcing is a proven strategy for scaling without compromising on consistent quality
- Focus on delivering high quality service to your book of business knowing your licensing, registration, and securities requirements are taken care of

[Visit for more info](#)

or call 800.444.4813

Sircon Managed Services Process Inventory

Our experts support agencies and carriers by providing licensing services for producers and adjusters, onboarding services for carriers with an independent agency channel, and/or data management solutions for all clients.

Onboarding

- Individual producers, adjusters
- Firms, agencies, locations
- Initial data collection and contracting
- Order background investigations

Data maintenance

- Demographic changes address/contact
- Affiliations and Designated Responsible Producers (DRP)
- Merger & acquisition support
- Compliance data synchronization
- Custom data projects

Licensing and education

- License applications
- License renewals
- License renewal and CE notices
- License renewal automation

Additional adjuster services

- Bond Processing
- Georgia Affidavit
- Designated Home State Licensing

Appointments and relationships

- Appointments (for agency clients)
 - List of new agents to appoint
 - List of agents to terminate
- Appointments (for carrier clients)
 - New appointment filings
 - Appointment renewal filings
 - Appointment termination filings
 - Just in Time (JIT) appointment exception review
- Mass appointment projects (new or termination)
- Terminating for lack of production

Support and business analytics

- Standard reports
- AdHoc/interactive reports
- Call center/email support

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