

# Sircon Managed Services

## Lose the work, gain efficiencies.

Sircon Managed Services (SMS) is your partner in strategic outsourcing of licensing, compliance, and registration operations. As part of our comprehensive distribution management solution of integrated technology and dedicated experts, the SMS team of professionals can manage your regulatory needs to the highest industry quality. Our proven expertise provides 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, such as:
  - License applications and renewals
  - Onboarding
  - Continuing education (CE)
  - Appointments, relationship management, and terminations
  - And more!
- The benefit of our integrated and 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.

### BPO and why it matters

Business process outsourcing (BPO) is a standard practice in insurance and other industries, a strategic option that provides several key benefits. When working with a reputable provider capable of delivering comprehensive and integrated services, BPO allows carriers to accomplish more by refocusing their internal resources on growth objectives while trusting an external partner's proven expertise to synchronously manage workflows.

Importantly, BPO helps carriers scale efficiently without compromising oversight. By leveraging capabilities and professional skillsets to enhance day-to-day processes, BPO helps top insurers improve their compliance operations for a competitive advantage and superior agent experience. Additionally, outsourcing can immediately unlock complex functionalities that carriers may not have in-house, without needing to shift teams or develop new divisions from the ground up.

In one confidential case study focused on a top 30 property and casualty insurer, outsourcing adjuster licensing operations helped to significantly increase their overall service capacity for policyholders and claims processing.

or call 800.444.4813

# Sircon Managed Services for Agencies

Our experts support agencies by providing licensing services for producers and adjusters, onboarding services for agencies with an independent agency channel, and/or data management solutions for all clients. Here are examples of how our experts can support you.

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|---|---|---|
| <b>Onboarding</b> <ul style="list-style-type: none"> <li>• Individual producers, adjusters</li> <li>• Firms, agencies, locations</li> <li>• Initial data collection and contracting</li> <li>• Order background investigations</li> </ul> | <b>Data maintenance</b> <ul style="list-style-type: none"> <li>• Demographic changes address/contact</li> <li>• Affiliations and Designated Responsible Producers (DRP)</li> <li>• Merger &amp; acquisition support</li> <li>• Compliance data synchronization</li> <li>• Custom data projects</li> </ul> | <b>Licensing and education</b> <ul style="list-style-type: none"> <li>• License applications</li> <li>• License renewals</li> <li>• License renewal and CE notices</li> <li>• License renewal automation</li> </ul> |
| <b>Additional adjuster services</b> <ul style="list-style-type: none"> <li>• Bond Processing</li> <li>• Georgia Affidavit</li> <li>• Designated Home State Licensing</li> </ul>   | <b>Appointments and relationships</b> <ul style="list-style-type: none"> <li>• List of new agents to appoint</li> <li>• List of agents to terminate</li> </ul>  | <b>Support and business analytics</b> <ul style="list-style-type: none"> <li>• Standard reports</li> <li>• AdHoc/Interactive reports</li> <li>• Call center/email support</li> </ul>                                |

| Key benefits   |   |  |
|--|---|--|
| <b>Speed to revenue</b> <ul style="list-style-type: none"> <li>• Reduce the time and cost to manage licensing for new and veteran producers</li> <li>• Faster processing time for onboarding, appointments, and renewals means quicker revenue generation</li> </ul> | <b>Improved compliance quality</b> <ul style="list-style-type: none"> <li>• Sircon's industry best practices and consistent operational excellence reduces your risk of non-compliance, saving money on potential fines and fees</li> <li>• Never miss another change or deadline with real-time notifications and state regulatory monitoring</li> </ul> | <b>Outsourcing is a strategic advantage</b> <ul style="list-style-type: none"> <li>• Outsourcing is a proven strategy for scaling without compromising on consistent quality</li> <li>• Focus on delivering high quality service to your book of business knowing your licensing, registration, and securities requirements are taken care of</li> </ul> |

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