

# Sircon Producer Manager for Agencies

## Are your agents authorized?

Sircon® Producer Manager for Agencies™ streamlines and automates your compliance processes, simplifying the management of producer relationships and credentials. By synchronizing your entire producer record with data from the National Producer Database (PDB) and other trusted data sources, Producer Manager for Agencies ensures that you are working with the same data that state regulators have on file.

### Compliance capabilities at your fingertips

- Apply for and renew licenses as needed
- View producers' appointments and verify sales authorization based on appropriate license
- Create and update producer records using PDB data
- Receive key licensing notifications, such as upcoming license renewals and expirations
- Leverage built-in workflows and regulatory rules, updated by Vertafore's compliance experts
- Update business data in bulk\*

### Track and store the most up-to-date data in one central location

Producer Manager keeps agent data in one place and functions as the single source of truth for producer data. On a nightly basis, your data is automatically synced with the latest PDB information for your producers.

### Standardize, automate and process electronically

Establish standardized processes for licensing responsibilities, automate data management, and implement electronic processing to ensure compliance and accelerate authorization management.

### Powerful reporting

Producer Manager can generate standard and interactive reports of your agent data in a variety of formats (including excel, pdf, or csv) to help you easily organize and analyze producer data.

### Organize your agent population

Producer Manager allows you to create business units, cost centers, and ID numbers to help keep track of structure within your population. This helps in reporting and in optional\* integration.

### A sound investment

Avoid fines for non-compliance and drive productivity by automating your compliance processes.

### Additional reporting capabilities include:

- New producers
- Individual or firm summary
- Licenses and applications
- Appointments
- License renewals due
- Individual-to-firm associations
- Continuing education in Sircon States\*
- Background investigations
- Business unit producers
- Producer costs inquiry
- Required items

\*May require additional investment

See why over 50% of licensing transactions go through Sircon.