

Getting Started with OIS: Insurance Concierge

Once you collect the documentation listed below and [complete your online profile](#), we will be able to contract you with insurance carriers moving forward.

STEP 1: COLLECT REQUIRED DOCUMENTS

ANTI-MONEY LAUNDERING CERTIFICATION:

- ✓ Must have been completed in the past 12 months
- ✓ If completed through LIMRA, please provide the date of completion

E&O INSURANCE:

- ✓ Declarations page must have the writing agents name printed on the certificate

LICENSES:

- ✓ Resident license for the writing agent and if setting up a Business Entity, the Resident Corp. license

LONG-TERM CARE CERTIFICATION (IF APPLICABLE):

- ✓ This applies to the initial course and any refresher courses you have completed

NAIC ANNUITY SUITABILITY CERTIFICATION AND BEST INTEREST TRAINING:

- ✓ This applies to the initial course and any refresher courses you have completed

VOIDED CHECK (TO BE USED IN SETTING UP EFT/DIRECT DEPOSIT):

- ✓ If contracting as an Individual, please provide a personal check
- ✓ If contracting as a Business Entity, please provide a corporate check
- ✓ Starter checks are not accepted by any carrier

BACKGROUND EXPLANATIONS/DOCUMENTATION:

- ✓ If you answer “yes” to any of the background questions please provide a written explanation, as well as any official documentation that applies

STEP 2: CREATE YOUR ACCOUNT, SUBMIT THE FORM, AND WE’LL FINALIZE THE ONBOARDING PROCESS.

[Click here](#) or the button below to create your account and begin the onboarding process.

[START ONBOARDING NOW >](#)

Shortly after form submission, an OIS licensing & contracting specialist will contact you to complete the process.



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QUESTIONS? WE’RE HERE TO HELP!

Call 877-726-1647 or email 1insurancesolution@mailpcn.com

[Schedule an appointment](#) with an OIS consultant

Learn more by visiting 1insurancesolution.com

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