



Agent Licensing Tips

ON HOW TO START GENERATING
EXTRA REFERRAL REVENUE

If you're a financial professional looking to get your annuity or life insurance license to expand the product solutions you can leverage to better serve your clients, we have the licensing guide for you. Check out the rest of our guide that outlines the general roadmap you'll need to complete to acquire your additional license.

Pre-Licensing (where applicable)

Some states require completing pre-license educational courses before taking the state insurance exam. Check with your state insurance department for specific requirements.

Sources for pre-license education courses: ExamFx, Kaplan Financial Education, SuccessCE.

Testing

Confirm the approved testing source for your state and schedule your exam. Third-party testing companies commonly used include Pearson Vue or Prometric.

The cost of the exam varies by state.

Verify what is required to bring on your test day. Examples include:

Identification

Proof of completion for the pre-license course(s), if applicable.

Applying

Check with your state for specific requirements when applying for an insurance license. Apply for a license through the National Insurance Producer Registry (NIPR) at nipr.com or Sircon at sircon.com.
A resident license must be obtained before applying for any non-resident licenses.

Contracting

Carriers may require additional product, Anti-Money Laundering (AML), or other training before appointment. Check with carriers for guidelines.
Get appointed with carrier(s). For assistance, reach out to your wholesaler or dedicated sales team for the next steps.

If you have questions, please contact the Compliance Team at ComplianceConnection@biltd.com with questions on your specific situation.

This piece is intended to be informational and provide generalized guidance. It should not be construed as legal advice or provide protection against compliance violations brought on by a consumer or state insurance commission. Note: Most states require a 4-hour annuity training course prior to engaging in the sale of annuities. Many states have reciprocal agreements regarding licensing. Check with your state department of insurance for their requirements.

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