

Sircon Credential and Relationship Management

Get and keep producers authorized to sell.

With Sircon, you get a single central vault for producer data that is always secure and up-to-date. Built-in regulatory rules let you know what and where your producers are authorized to sell.

Features you need

Accurate producer records

Synchronize with data from the National Producer Database (PDB) and other trusted data sources, ensuring that your information is always up-to-date and matches what the state regulators have on file.

- Licenses, lines of authority, appointments, and termination reasons by jurisdiction.
- Education, including product specific training.
- Compensation and relationship hierarchies, with templates and validation.
- Organizational structure and identifiers, such as business units, departments, and producer codes/writing numbers.

Real-time producer authorization status

Determine which producers are authorized to sell your products based on product type, state, underwriting company, and sales event.

Authorization rules are comprised of state regulations and your specific business rules.

- Licenses, lines of authority, and appointment rules, including effective dates and backdating.
- Securities registrations validation.
- Product specific requirements, such as AML, annuity and LTC suitability training.
- Auditing support with sales authorization history.
- Self-configured sales authorization profiles.

Some customers have seen potential for

- Reduced risk of non-compliance audits and fines.
- Time spent on audits/regulatory reviews cut in half.
- Decreased regulatory rules maintenance overhead by 14%.
- Creation of new producer records with current state information in seconds.
- 50% reduction in compliance staff overhead by eliminating rekeying of producer data into a mainframe solution.
- Reduced IT maintenance time and expense by 15%.

"Sircon has simplified the appointment process so much for our contracting associates. We used to require them to remember state guidelines and who should be appointed and who shouldn't. Now all they have to worry about is what state they want, then click a button."

Amanda Crume, Senior Administrator of Licensing and Contracting Assurity Life Insurance Company

Contact Us

or call 800.444.4813