



SERVICE REFERENCE GUIDE

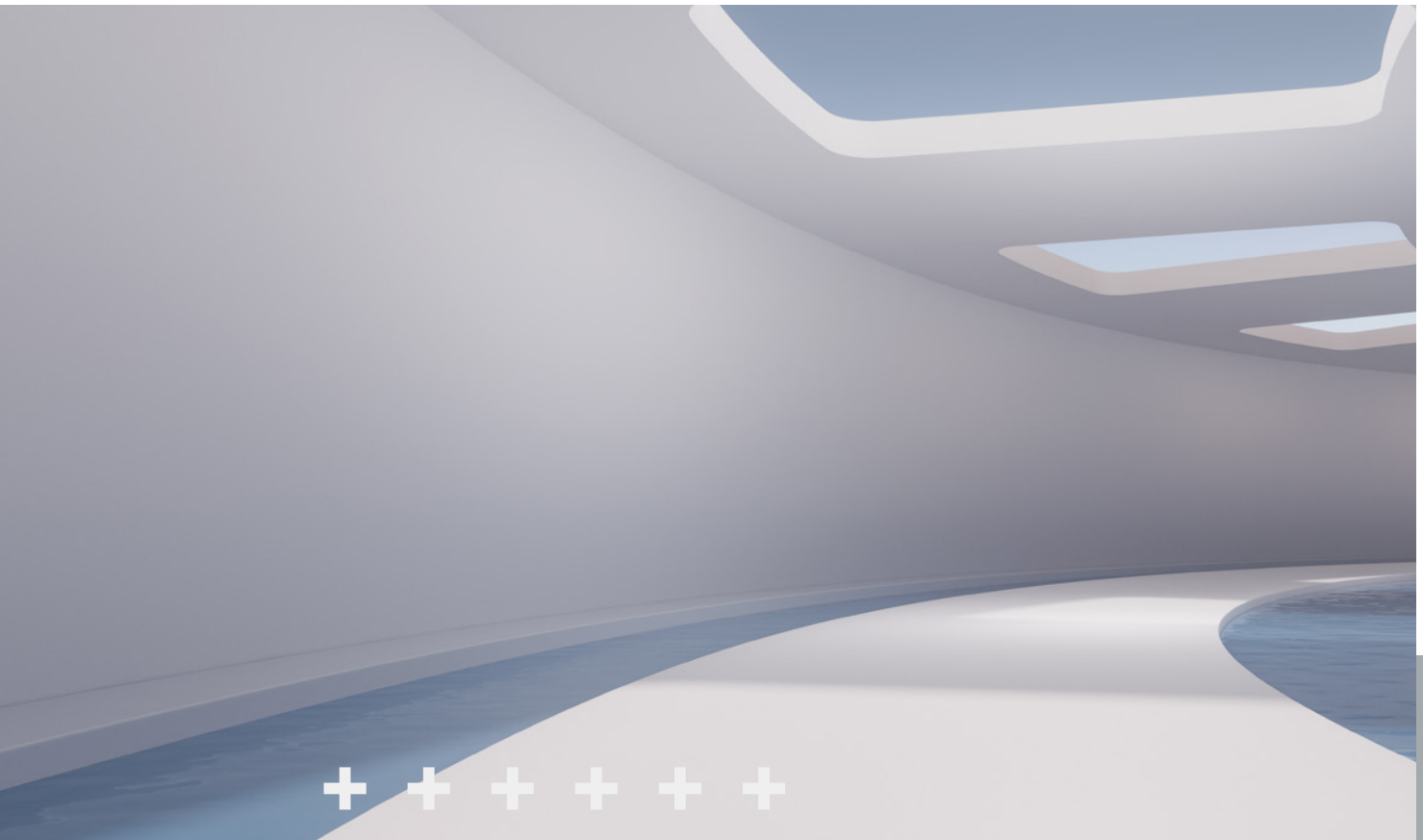
LICENSING SERVICES FOR INSURANCE PRODUCERS

Complete, organized solution
for the licensing requirements
of insurance agencies





Perr&Knight employs a team of highly skilled licensing professionals with many years of licensing and appointment experience in the insurance industry. Our licensing professionals are familiar with each state's requirements for nearly all types of licenses and are adept at handling virtually all licensing-related tasks. In addition, our licensing unit has built strong, effective working relationships with the various departments of insurance ("DOIs") and industry organizations.



Our licensing unit provides a complete, organized solution for the licensing requirements of insurance agencies, independent agents/brokers, third party administrators, reinsurance intermediaries and risk purchasing groups. Perr&Knight is dedicated to providing the highest level of service and quality to our licensing clients on all of their licensing projects, regardless of size or difficulty level. Perr&Knight's licensing services for insurance producers include:

PRODUCER LICENSING

Our licensing professionals assist individual agents/brokers and entities (i.e. agencies) with obtaining their licenses for nearly all types of insurance, in all U.S. jurisdictions. Our services include resident and non-resident licenses, both new and renewal. Perr&Knight also assists agencies with obtaining their certificates of authority.

RISK PURCHASING GROUP ("RPG") REGISTRATION

Perr&Knight assists RPGs with the registration process in all U.S. jurisdictions. This includes both new and renewal registrations.

ADJUSTER LICENSING

Our licensing professionals work with claims adjusters to ensure their adjuster licensing requirements are met. We can obtain and renew appropriate licenses for our claims adjuster clients.

SURPLUS LINES BROKERS

We work with our surplus lines broker clients to complete policy reporting and tax filing requirements.

REGULATORY RESEARCH

Perr&Knight has experience conducting regulatory research on a variety of insurance company licensing topics. Our consultants compile pertinent information from insurance statutes and regulations and organize it into a spreadsheet for clarity and ease of review and reference. The spreadsheet includes regulatory citations and source notes. Additionally, our consultants regularly conduct inquiries to our contacts at the DOIs, on behalf of our clients, in order to obtain DOI positions/opinions and other information that cannot be solely obtained through regulatory or statutory research.

In addition to the proficiency and experience of our licensing unit, our clients also benefit from the following qualities unique to Perr&Knight:

EFFICIENT PROCESS

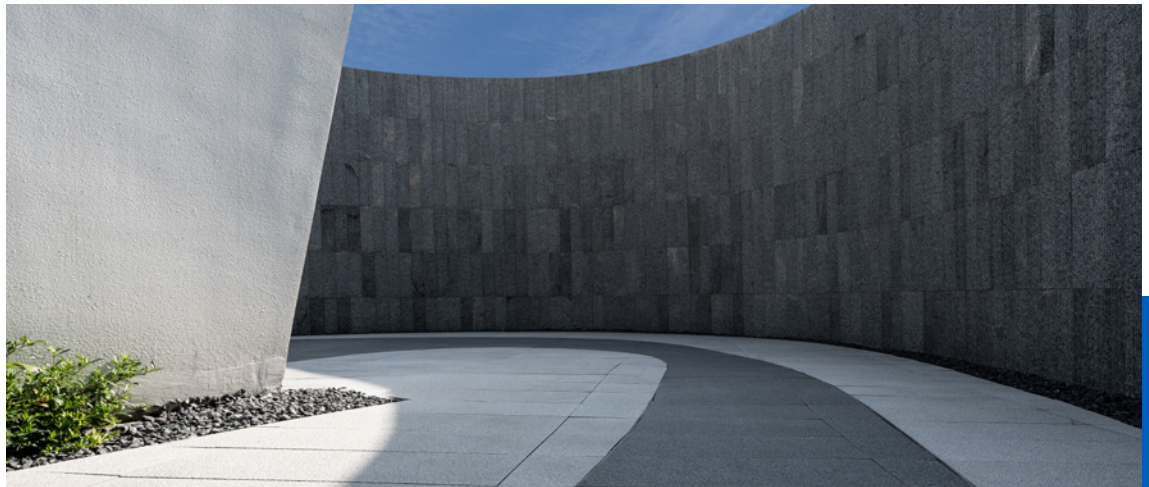
We utilize the latest technology available and strive to streamline the licensing process for our clients as much as possible through our organization and efficiency. We follow up regularly with the DOIs to check on the status of pending applications and confirm that all required materials have been received and are being reviewed. Our follow-ups continue until the application is approved and the license is issued.

LICENSEREPORTER.COM

Perr&Knight developed LicenseReporter.com to track all of its licensing projects. It is a secure web application through which clients can access their license applications online in real time in order to monitor approval progress and access filed materials. On LicenseReporter.com, our clients can navigate through all of their current and past licensing applications and download all documents submitted with the applications in PDF.

COMPETITIVE PRICING

Our services are priced competitively. We charge lower hourly rates than law firms who perform the same services.



ABOUT PERR&KNIGHT

Founded in 1994, Perr&Knight provides insurance consulting and software solutions to the property & casualty and accident & health industries. Services include actuarial consulting, product development, insurance policy and forms consulting, regulatory compliance, state filings, licensing, technology consulting, statistical reporting, data services, and predictive analytics. Software includes [StateFilings.com](https://www.perrknight.com/statefilings), a leading cloud-based state filings management solution. With offices in Santa Monica, Boca Raton, the New York Metro Area, and Cincinnati, and more than 140 insurance professionals including over 30 credentialed actuaries, Perr&Knight is among the largest independent actuarial and insurance consulting firms in the United States.



888.201.5123 x2
[PerrKnight.com](https://www.perrknight.com)

Copyright© 2023 Perr&Knight. All Rights Reserved.

Perr&Knight is not a law firm and does not provide legal advice, services and/or opinions. Perr&Knight and its employees cannot act as legal counsel with respect to any matter and no attorney-client relationship is implied or created by anything contained herein. To the extent that during the course of providing consulting and other services, any information regarding legal matters is provided, Perr&Knight has made commercially reasonable efforts to ensure that such information is accurate. However, as laws vary from jurisdiction to jurisdiction and change rapidly, such information may not be up to date and all legal matters should be reviewed by your own in-house counsel, outside counsel and/or other legal advisors as appropriate who are licensed or otherwise permitted to practice law in the jurisdiction(s) involved.