



PRODUCER MANAGEMENT PORTAL

DTCC's Insurance & Retirement Services (I&RS) offers a suite of streamlined processing and compliance driven solutions for carriers and their distribution partners through a secure, centralized infrastructure.

OVERVIEW

Producer Management Portal (PMP) is the most comprehensive source available for centralized sharing, tracking and verifying producer training completions. PMP helps insurance carriers and distributors manage and comply with NAIC producer training requirements in a standard web services environment, providing detailed producer training completion information and real-time point-of-sale training authorizations at a low cost.

WHO CAN USE THIS SERVICE

PMP is available to firms that are members of DTCC's National Securities Clearing Corporation (NSCC). Visit dtcc.com/client-center for information on how to become a member of NSCC or dtcc.com/client-center/membership-dtcc-solutions for information on how to become a member of DTCC Solutions.

MAXIMIZING YOUR ACCESS, WHILE MINIMIZING TIME AND EFFORT

Real-time B2B and batch processing of training data from the majority of industry education providers as well as an online, real-time user interface allow for a broad audience of data consumers. The portal includes:

- Education vendor-sourced course completion details for state training
- Insurance carrier-sourced course completion details for product training
- Insurance carrier-sourced training authorization for annuity sales (based on producer ID, product, state and application date - verifies state and product training)

BENEFITS

With PMP, clients can:

- Decrease operating costs by reducing redundant manual processes and eliminating paperwork, faxes, and overnight mail

- Reduce the lead time for obtaining and sharing training completion information, allowing agents to begin selling more quickly and compliantly
- Help to eliminate unauthorized sales by reconciling distributors' and carriers' records
- Support compliance with carrier-interpreted state reciprocity rules through point-of-sale authorization processing of verified data, with user-friendly reporting mechanisms
- Support STP, giving users the means to manage training requirements within their existing straight through processing environment
- Access producer training completion and authorization data from most training providers through one web interface, with virtually no technology development needed
- Provide transparency by delivering transferable training details when producers move amongst distributors within the industry
- Secure confidential data through DTCC's Securely Managed And Reliable Technology (SMART) network, which provides centralized, end-to-end managed communications.

HOW PRODUCER MANAGEMENT PORTAL WORKS

Using a B2B, mainframe or Internet connection, insurance carriers and distributors can share information on producer training completions and authorizations through DTCC Solutions LLC.

A web interface is available for data consumers to directly access the information without requiring technology development.

FOR MORE INFORMATION

Please contact Insurance & Retirement Services at **1-888-382-2721**, email us at insurance@dtcc.com or visit us on the web at dtcc.com/insurance

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