General Insurance Agent Licence Transition

Quick Start Guide

January 2023



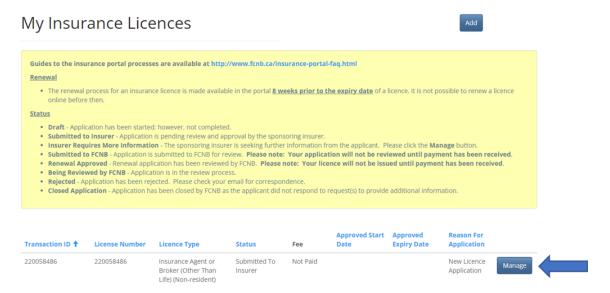
Summary

- FCNB will send out an email to current Non-Resident Other Than Life Insurance Agent or Broker licensees before their current licence expires, allowing the licensee to submit the "Request New Licence Type" filing via the <u>FCNB Portal</u>.
- If you currently hold a Non-Resident Other Than Life Insurance Agent or Broker licence:
 - You may use the link included in the email or go directly to the <u>FCNB Portal</u> to submit the "Request New Licence Type" filing. You will use your existing username (email address) and password for the portal.
 - You must review the details of the <u>licensing qualifications and educational</u>
 <u>requirements</u> and select the appropriate **General Insurance Agent** licence (level 1,2, or 3).
 - You must submit details of any educational courses and equivalent training and experience you have completed.
 - If you do not have the required education courses, you should detail your equivalent training and experience clearly. FCNB will assess your equivalent training and experience to determine the appropriate licence level.
 - Once the filing has been reviewed and approved, you will receive confirmation from FCNB. If the approval is within 8 weeks of the existing licence expiry date, the option to "Renew" your new General Insurance Agent licence will become available on the FCNB Portal.

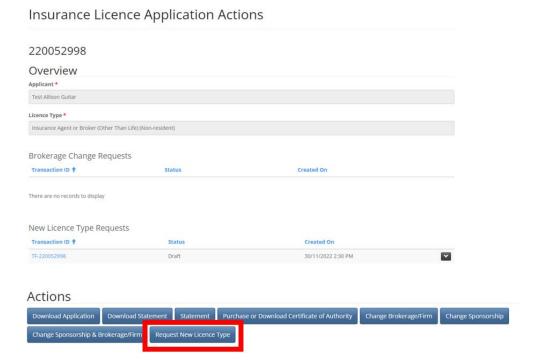
See below for instructions on how to submit the "Request New Licence Type" filing via the FCNB Portal.

How to submit the "Request New Licence Type" filing via the FCNB Portal

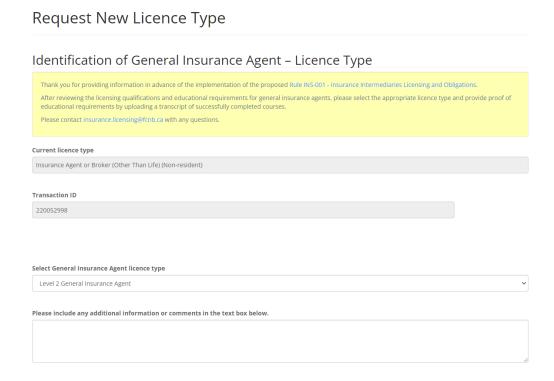
1) Go to the **My Insurance Licences** Homepage and click the "Manage" button next to your current licence.



2) Select "Request New Licence Type"

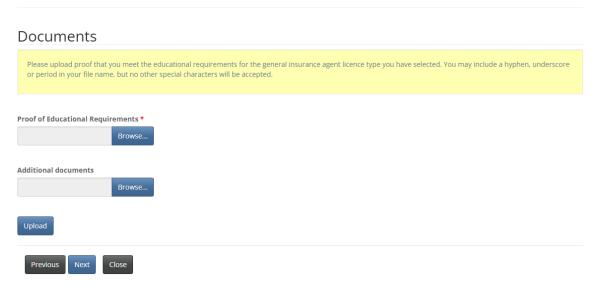


3) Select the **General Insurance Agent** licence type (Level 1, 2, or 3). Include details of any equivalent training or experience.



4) Upload proof of educational requirements or a document that provides details of your equivalent experience.

Request New Licence Type



5) Complete submission

Request New Licence Type

Confirmation I confirm that the information provided in the application is true and correct to the best of my knowledge and no material information has been omitted. * Previous Submit Close

6) Once submitted, you will be directed to a page confirming successful submission.

Request New Licence Type

Thank you for your submission.

You will be contacted by our licensing team, should FCNB have any questions regarding the details you have provided. Otherwise, you will receive an email confirming once your submission has been reviewed and accepted.



If you have any questions about this process, please contact insurance.licensing@fcnb.ca.