

4. Licensing & Compliance Overview - Pre & Post Hire

Time: 2 Hours

Who: HR-Dallas (COO)

Where: Office

Overview

The purpose of this activity is to review the process of successfully obtaining a Texas insurance license.

Objectives

As a result of this overview the Producer will be able to:

- Explain the responsibilities and duties in the statutory licensing process
- Describe and discuss the responsibilities of our company in resident and non-resident licensing compliance
- Explain the need and process for carrier appointments
- State who to contact within RHSB for licensing and carrier appointment issues

Steps

1. Pre-hire activities will vary depending on individual producers current status
2. Post-hire, COO will meet with the Producer to review non-resident agent licensing and carrier appointments

Materials

- Kaplan on-line licensing exam prep class
- TDI licensing information bulletin
- Prometric fingerprinting and exam registration
- TDI individual license application

Follow-up

COO will follow up with Producer after successful completion of exam, as outlined above