

General Insurance Agent Licence Transition

Quick Start Guide

January 2023

FINANCIAL AND
CONSUMER SERVICES
COMMISSION



COMMISSION DES SERVICES
FINANCIERS ET DES SERVICES
AUX CONSOMMATEURS

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 [FCNB Portal](#).
- 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 [FCNB Portal](#) 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 [licensing qualifications and educational requirements](#) 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.

My Insurance Licences

Add

Guides to the insurance portal processes are available at <http://www.fcnb.ca/insurance-portal-faq.html>

Renewal

- The renewal process for an insurance licence is made available in the portal **8 weeks prior to the expiry date** of a licence. It is not possible to renew a licence online before then.

Status

- **Draft** - Application has been started; however, not completed.
- **Submitted to Insurer** - Application is pending review and approval by the sponsoring insurer.
- **Insurer Requires More Information** - The sponsoring insurer is seeking further information from the applicant. Please click the **Manage** button.
- **Submitted to FCNB** - Application is submitted to FCNB for review. **Please note: Your application will not be reviewed until payment has been received.**
- **Renewal Approved** - Renewal application has been reviewed by FCNB. **Please note: Your licence will not be issued until payment has been received.**
- **Being Reviewed by FCNB** - Application is in the review process.
- **Rejected** - Application has been rejected. Please check your email for correspondence.
- **Closed Application** - Application has been closed by FCNB as the applicant did not respond to request(s) to provide additional information.

Transaction ID ↑	License Number	Licence Type	Status	Fee	Approved Start Date	Approved Expiry Date	Reason For Application	Manage
220058486	220058486	Insurance Agent or Broker (Other Than Life) (Non-resident)	Submitted To Insurer	Not Paid			New Licence Application	Manage



- 2) Select “Request New Licence Type”

Insurance Licence Application Actions

220052998

Overview

Applicant *

Test Allison Guitar

Licence Type *

Insurance Agent or Broker (Other Than Life) (Non-resident)

Brokerage Change Requests

Transaction ID ↑	Status	Created On
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There are no records to display

New Licence Type Requests

Transaction ID ↑	Status	Created On
TF-220052998	Draft	30/11/2022 2:30 PM

Actions

Download Application Download Statement Statement Purchase or Download Certificate of Authority Change Brokerage/Firm Change Sponsorship

Change Sponsorship & Brokerage/Firm **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.

Request New Licence Type

Identification of General Insurance Agent – Licence Type

Thank you for providing information in advance of the implementation of the proposed [Rule INS-001 - Insurance Intermediaries Licensing and Obligations](#).
After reviewing the licensing qualifications and educational requirements for general insurance agents, please select the appropriate licence type and provide proof of educational requirements by uploading a transcript of successfully completed courses.
Please contact insurance.licensing@fcnb.ca with any questions.

Current licence type

Insurance Agent or Broker (Other Than Life) (Non-resident)

Transaction ID

220052998

Select General Insurance Agent licence type

Level 2 General Insurance Agent

Please include any additional information or comments in the text box below.

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

Request New Licence Type

Documents

Please upload proof that you meet the educational requirements for the general insurance agent licence type you have selected. You may include a hyphen, underscore or period in your file name, but no other special characters will be accepted.

Proof of Educational Requirements *

Additional documents

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.

Previous

Close

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