

**COMMONWEALTH OF PENNSYLVANIA
INSURANCE DEPARTMENT**



**QUALIFICATION REQUIREMENTS
FOR MANAGERS OR EXCLUSIVE GENERAL AGENTS**

QUALIFICATION REQUIREMENTS FOR MANAGERS OR EXCLUSIVE GENERAL AGENTS

The Commonwealth of Pennsylvania appreciates your interest in doing business here. In order to act in the capacity of a manager (“MGR”) or exclusive general agent (“EGA”) for an insurer domiciled in Pennsylvania, you must first obtain a license. This packet will explain the procedures to be followed and the documentation to be filed to obtain a MGR or EGA License.

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Please refer to the following for guidance:

40 P.S. § 310.31 et seq. (Licensing of Managers and Exclusive General Agents)
31 Pa. Code § 127 (Management Contracts or Exclusive General Agency Agreements)

Any individual, corporation, or partnership subject to the requirements of 40 P.S. § 310.31 et seq. shall review the law and the regulation in its entirety to become familiar with all requirements. For information on purchasing the compilation of the Pennsylvania Insurance Laws and cumulative pocket supplement thereto please see:

<http://www.ins.state.pa.us/ins/cwp/view.asp?a=1282&q=524989>

The Insurance Department’s regulations are available at:

<http://www.pacode.com/secure/data/031/031toc.html>

I. GENERAL APPLICATION PROCEDURES

You may find the following general comments helpful as you proceed through the application process. At any time during the process, please do not hesitate to contact the Company Licensing Division at (717) 787-2735 or fax (717) 787-8557 should you have a question.

- 1) To expedite the process, we recommend that you assign one member of your staff as the designated point of contact for all correspondence and/or telephone inquiries.
- 2) After receiving your application, the Department assigns a Licensing Specialist to process your submission. Please use this person as your primary point of contact with the Department.
- 3) Your timely response to any concerns or questions raised during the review of your materials is appreciated. Departmental inquiries that remain unanswered for over 90 days may result in the application being considered inactive.

II. SPECIFIC REQUIREMENTS

The following information shall be provided to the Department in order to make a determination for licensure as an MGR or EGA:

- 1) Application filing fee of \$400. Make check payable to the "Commonwealth of Pennsylvania."
- 2) A completed application form.
 - a. Corporation or Partnership Application – IDL-72 MGR/EGA, or
 - b. Individual Application – IDL-71 MGR/EGA

NOTE: A separate application form is required for each insurance company represented.

- 3) A copy of the agreement between the MGR or EGA and the insurance company represented.
- 4) A copy of the Resolution of the Board of Directors of the insurance company approving the agreement, certified by its Corporate Secretary.
- 5) For EGA's, a copy of a resident or non-resident agent's or agency's license.

***Forms required for qualification as an agent ("IDL-01 & IDL-02") can be obtained on the Bureau of Producer Licensing's Web-Page. These should be submitted directly to the Bureau of Producer Licensing if the applicant is not a licensed Pennsylvania agent.

MGR and EGA licenses must be renewed annually on the anniversary date of the initial license, or upon implementation of a new agreement with the insurance company.

Return completed application and attachments to:

Pennsylvania Insurance Department
Company Licensing Division
1345 Strawberry Square
Harrisburg, PA 17120