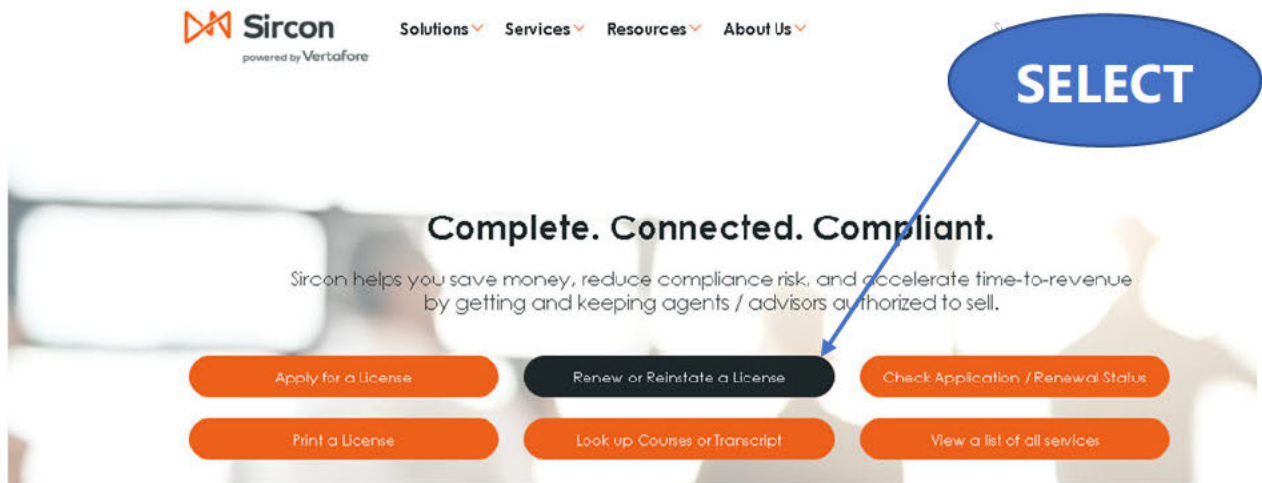


Tutorial for Premium Finance License Renewal

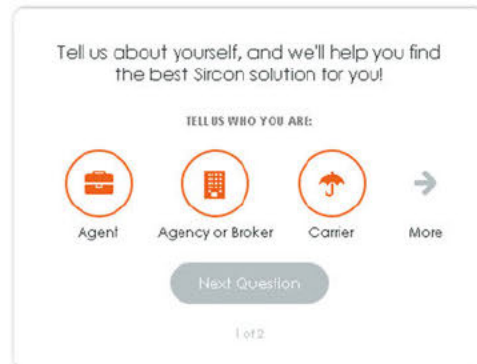
Go to www.sircon.com

Select "Renew or Reinststate a License"




Take our quiz to see how Sircon can help you manage your compliance.

Insurance is all about relationships, and compliance is no exception. Sircon connects all of the compliance stakeholders together so that everyone knows who is authorized to sell.



Select "Renew Insurance Licenses"

License Renewal

 If you have recently completed all continuing education requirements, please allow 2-5 business days for the education provider to report the credit hours to the State.

[Check the Status of a Submitted License Renewal](#)

RENEW INSURANCE LICENSES

Renew or reinstate an **existing insurance license**

[Renew Insurance Licenses](#)

RENEW ADJUSTER LICENSES

Renew or reinstate an **existing adjuster license**

[Renew Adjuster Licenses](#)

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SELECT



Select **"Firm"** and then click **"Continue."**

License Renewal

i If you have recently completed all continuing education requirements, please allow 2-5 business days for the education provider to report the credit hours to the State.

[Check the Status of a Submitted License Renewal](#)

RENEW INSURANCE LICENSES

Renew or reinstate an **existing insurance license** [Renew Insurance Licenses](#)

Are you an individual or a firm? Individual Firm

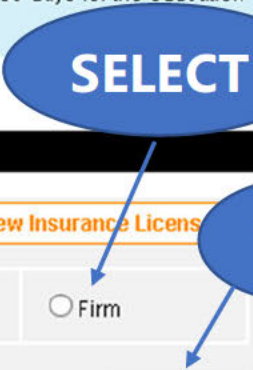
[Cancel](#) [Continue](#)

RENEW ADJUSTER LICENSES

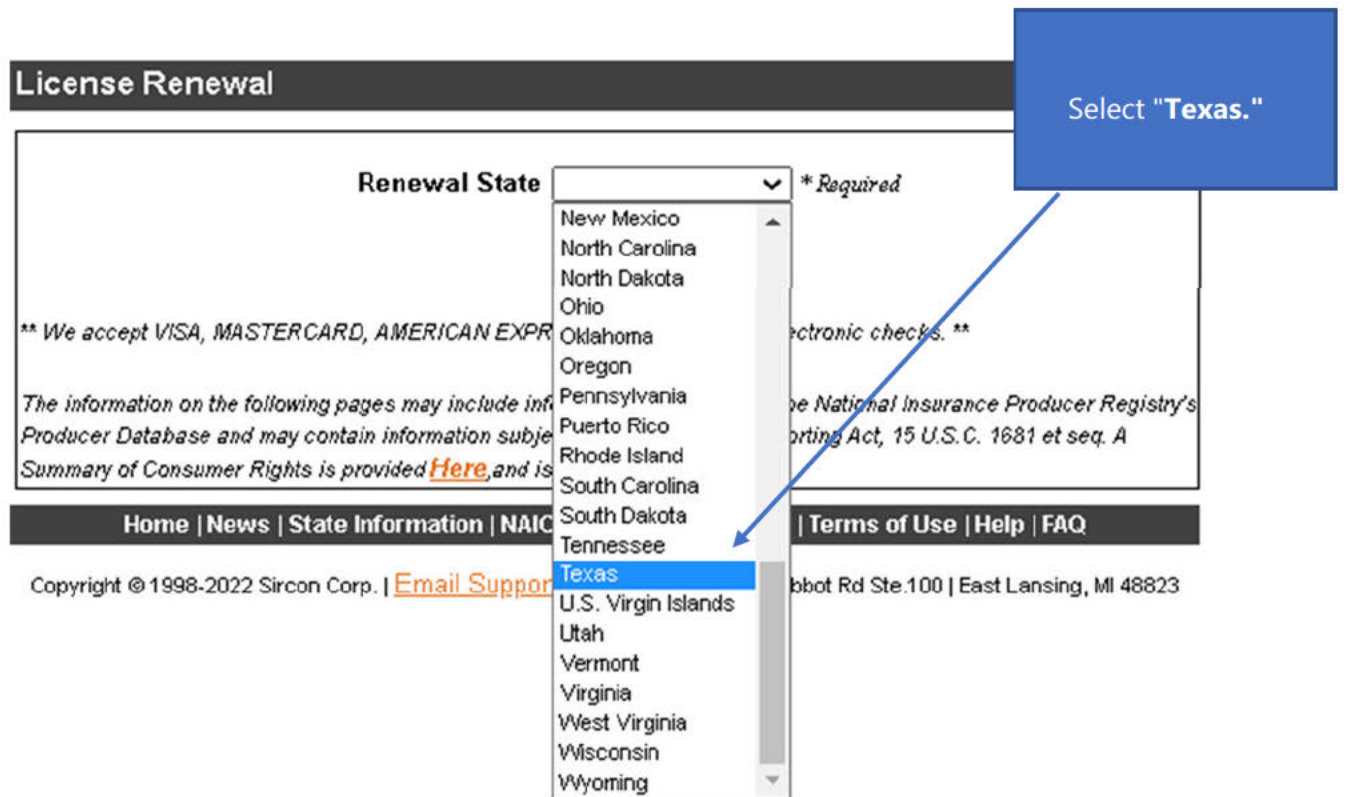
Renew or reinstate an **existing adjuster license** [Renew Adjuster Licenses](#)

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Select **"Texas"** from the Renewal State drop-down menu.



License Renewal

Renewal State * Required

*** We accept VISA, MASTERCARD, AMERICAN EXPRESS, and Discover. We do not accept cash or electronic checks. ***

The information on the following pages may include information from the National Insurance Producer Registry's (NIPR) National Insurance Producer Registry's Reporting Act, 15 U.S.C. 1681 et seq. A

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Dropdown menu options: New Mexico, North Carolina, North Dakota, Ohio, Oklahoma, Oregon, Pennsylvania, Puerto Rico, Rhode Island, South Carolina, South Dakota, Tennessee, **Texas**, U.S. Virgin Islands, Utah, Vermont, Virginia, West Virginia, Wisconsin, Wyoming.

Click "Search for a specific license"

License Renewal

Renewal State	<input type="text" value="Texas"/>	* Required
EIN	<input type="text"/>	* Required
Resident State	<input type="text"/>	* Required
Resident License Number	<input type="text"/>	* Required

Don't have a resident license? [Search for a specific license](#)

**** We accept VISA, MASTERCARD, AMERICAN EXPRESS, DISCOVER and electronic checks. ****

The information on the following pages may include information provided from the National Insurance Producer Registry's Producer Database and may contain information subject to the Fair Credit Reporting Act, 15 U.S.C. 1681 et seq. A Summary of Consumer Rights is provided [Here](#), and is available for viewing.

Click "Search for a specific license"

Fill out the required data, including the Texas license number being renewed

License Renewal

Renewal State * Required

EIN * Required

Resident State * Required

Resident License Number * Required

Don't have a resident license? [Search for a specific license](#)

**** We accept VISA, MASTERCARD, AMERICAN EXPRESS, DISCOVER and electronic checks. ****

The information on the following pages may include information provided from the National Insurance Producer Registry's Producer Database and may contain information subject to the Fair Credit Reporting Act, 15 U.S.C. 1681 et seq. A Summary of Consumer Rights is provided [Here](#), and is available for viewing.

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Complete the required information, including the Texas license number, and click "Continue."

License Renewal

Verify the data presented, then click "Continue."

Please review the selected items you wish to renew. Note: Some States do not have Qualifications available for renewal. For these states, all associated Qualifications will be renewed when the License is renewed.

Texas License Renewals

Action	License Type	Lic. Number	Exp. Date
<input checked="" type="checkbox"/> Renew	Premium Finance		12-31-2022

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License Renewal

License Fee Summary

License Renewals for Texas

License Type	Lic. Number	Exp. Date	State Fee
Premium Finance	[REDACTED]	12-31-2022	* \$200.00

*The state fees for this renewal are estimated. The final fees will be determined after all data has been entered.

Confirmation Email Address

Email Address * Required

Verify the data presented, then provide your email address

Compliance Express™

Texas Premium Finance Renewal Questions

** All questions are required.*

Question 1

NOTE: For Questions 1a, 1b, and 1c "Convicted" includes, but is not limited to, having been found guilty by verdict of a judge or jury, having entered a plea of guilty or nolo contendere or no contest, or having been given probation, a suspended sentence or a fine.

If you answer yes to any of these questions, you must attach to this application:

- a) a written statement identifying all parties involved (including their percentage of ownership, if any) and explaining the circumstances of each incident,
- b) a copy of the charging document,
- c) a copy of the official document, which demonstrates the resolution of the charges or any final judgment.

Question 1A

Has the business entity or any owner, partner, officer or director of the business entity, or member or manager of a limited liability company, been convicted of, or is currently charged with, committing a misdemeanor or had a judgment withheld or deferred for a misdemeanor which has not been previously reported to this insurance department?

You may exclude the following misdemeanor convictions or pending misdemeanor charges: traffic citations, driving under the influence (DUI) or driving while intoxicated (DWI), driving without a license, reckless driving, or driving with a suspended or revoked license.

You may also exclude juvenile adjudications (offenses where you were adjudicated delinquent in juvenile court.)

No
 Yes

Question 1B

Has the business entity or any owner, partner, officer or director of the business entity, or member or manager of a limited liability company, ever been convicted of or is currently charged with a military offense which has not been previously reported to this insurance department?

No
 Yes

Answer all questions
carefully.

Attach any required
documentation after you
submit the application.

Compliance Express™

Question 2

Has the business entity or any owner, partner, officer or director of the business entity, or member or manager of a limited liability company, ever been convicted of, or is currently charged with committing a felony or had a judgment withheld or deferred for a felony which has not been previously reported to this insurance department?

You may exclude juvenile adjudications (offenses where you were adjudicated delinquent in a juvenile court.)

No
 Yes

Question 2A

If you have a felony conviction involving dishonesty or breach of trust, have you applied for written consent to engage in the business of insurance in your home state as required by 18 USC 1033?

No
 Yes
 Not Applicable

Question 2B

If so, was consent granted? (Attach copy of 1033 consent approved by home state.)

No
 Yes
 Not Applicable

Question 3

Has the business entity or any owner, partner, officer or director of the business entity, or manager or member of a limited liability company, been named or involved as a party in an administrative proceeding, including a FINRA sanction or arbitration proceeding regarding any professional or occupational license, or registration, which has not been previously reported to this insurance department?

"Involved" means having a license censured, suspended, revoked, canceled, terminated; or, being assessed a fine, placed on probation, sanctioned or surrendering a license to resolve an administrative action. "Involved" also means being named as a party to an administrative or arbitration proceeding which is related to a professional or occupational license. "Involved" also means having a license application denied or the act of withdrawing an application to avoid a denial. You may exclude terminations due solely to noncompliance with continuing education requirements or failure to pay a renewal fee.

If you answer yes, you must attach to this application:

a) a written statement identifying the type of license; identifying all parties involved (including their percentage of ownership, if any) and explaining the circumstances of each incident,
b) a copy of the Notice of Hearing or other document that states the charges and allegations, and
c) a copy of the official document which demonstrates the resolution of the charges or any final judgment.

No
 Yes

Answer all questions
carefully.

Attach any required
documentation after you
submit the application.

Compliance Express™

← → ↻ 🏠 🔒 [Redacted] 🔍 ⭐ 📁 ⚙️ ⋮

Question 4

Please enter the applicant's primary contact business email address below.

The applicant's record will be updated to reflect the primary business email contact listed below.

Question 5

An email address of a member of the public that is provided for the purpose of communicating electronically with a governmental body is confidential and not subject to disclosure. Tex. Gov't Code §552.137(a). However, a member of the public's email address may be released if the member of the public affirmatively consents to disclosure of the email address. Tex. Gov't Code §552.137(b).

Does this applicant for Renewal consent to public disclosure of their primary contact email address?

No
 Yes

Question 6

Does this applicant for renewal understand that whether the applicant renews or non-renews the license, the applicant is still responsible for filing an Annual Operations Report and Annual Assessment Fee, due April 1?

No
 Yes

Answer all questions **carefully.**

Attach any required documentation after you submit the application.

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Question 7

Does the applicant consider themselves an independent Insurance Premium Finance Company?

No
 Yes

Question 7A

Is the applicant affiliated or have common ownership with any of the selections in 4b?

No
 Yes
 Not Applicable

Question 7B

Enter all that apply from the following:
Example: A, B, C

A. Insurance Agent
B. Insurer
C. Managing General Agent
D. Another Premium Finance Company
E. Bank, Savings & Loan and /or Credit Union
F. Regulated Loan Company

Question 7C

Explain the selections made in question 4b in the space provided below:

Question 8

Does the licensee at all times maintain net assets for use in the insurance Premium Finance business at this location of not less than \$25,000?

(Net assets are defined as the total value of assets available for use in the business less liabilities.)

No
 Yes

Answer all questions carefully.
Attach any required documentation after you submit the application.

Question 9

Are the Premium Finance books and records at a location different from the physical address provided to the Department?

- No
 Yes

Question 9A

If the location is different from the physical address provided to the Department, provide the address below:

Question 10

Has this company had any Officer or Director changes?

If "Yes", submit completed form [FIN164](#) and completed and notarized form [FIN166](#) with this renewal submission.

- No
 Yes

Question 11

Is the applicant for renewal a Sole Proprietor or Partner?

- No
 Yes

Question 11A

Will the Current Franchise Tax Certificate of Good Standing or Letter of Exemption issued by the Texas Comptroller of Public Accounts, be submitted with this renewal application?

(<https://mycoa.coa.state.tx.us/coa/index.html>)

- No
 Yes
 Not Applicable

Question 12

Will a certification page on Company letterhead, signed by an Officer, Partner, or Sole Proprietor, be attached to this renewal application attesting that the correct name, physical location and ownership of the licensee is on file with the Texas Department of Insurance and the answers given herein are true, and correct?

This document must be attached, or the renewal cannot be processed.

- No
 Yes
-

Answer all questions
carefully.

Attach any required
documentation after you
submit the application.

Attestation for Texas

By renewing online, you affirm that you have reported to the Department any administrative action and/or any criminal history, including convictions, deferred adjudications, probations or pending charges. You may report such information by scanning and electronically attaching the required documentation directly to your renewal application from the confirmation page. Federal law (18 USC 1033), prohibits an individual from engaging in the business of insurance if they have been convicted of a crime involving dishonesty or breach of trust without express written consent of a commissioner of insurance.

I certify that all the information provided with this transaction are true and correct.

In Addition, for Life Settlement Broker or Providers
I certify that the account status issued by the Texas Comptroller of Public Accounts reflects that the licensee is in good standing or temporary good standing
or

I certify that the licensee is not subject to the Texas Tax Code Chapter 171;
and if a life settlement broker.

I certify that the life settlement broker and each owner, partner, director, member, officer, and designated employee named in the application or in any supplement to the application, who perform acts of a life settlement broker under Insurance Code §1111A.002(2), has completed training equivalent to that required of individual brokers under §3.1723 of this title (relating to Course and Training Requirements for Brokers), unless the individual is exempted under §3.1723(c) of this title or has been associated with the license holder for less than two years.

For SFMO Renewals Only:

In applying for a renewal of an SFMO industry certificate of registration, I certify that I am familiar with and will comply with the Texas Insurance Code and the Texas Administrative Code applicable to the certificate being renewed. I hereby authorize the Texas State Fire Marshal or his representative to enter, examine and inspect any premises, building, room, or establishment used by my firm while engaged in the business the firm is licensed for, to determine compliance with the provisions of the Texas Insurance Code and the Texas Administrative Code applicable to the certificate being renewed.

For Public Insurance Adjuster renewals only:

I will attach a copy of my public insurance adjuster contract and proof of financial responsibility with this submission.

For Utilization Review Agents (URA and URAREG)

I have read and understood the URA application and attachments and that the answers are true and correct. I further attest that I am familiar and compliant with the Texas statutes and rules that relate to the type of utilization review that the applicant is performing in Texas (Texas Insurance Code, Chapters 4201 and 1305, TDI rules, Texas Labor Code provisions, and DWC rules).

I attest that the applicant has written policies and procedures that comply with all URA statutes and rules. I understand that TDI may request, at any time, copies of all written policies and procedures that were not submitted with this renewal application.

For Independent Review Organizations (IRO)

I have read and understood the IRO application and attachments and that the answers are true and correct. I further attest that I am familiar and compliant with the Texas statutes and rules that relate to the independent review that the applicant is performing in Texas (Texas Insurance Code, Chapters 4202, TDI rules, Texas Labor Code provisions, and DWC rules including 28 TAC 133.308).

I attest that under penalty of applicable law that the applicant is not a subsidiary of, or in any way owned or controlled by, a payor or a trade or professional association of payors. I further state that I understand this to be a condition of licensure and any violation of this prohibition will result in forfeiture of certification as an Independent Review Organization and other administrative penalties are possible.

Agree *Required*

Submitter Information

Producer Authorized Submitter

Back

Continue

Cancel

Read **Attestation**
carefully,
Select **"Agree"**
then Click
Continue

Below is an **example** of the fee page associated with the transaction.

The screenshot shows a web browser window with the title 'Compliance Express™'. The page content includes:

- License Renewal** header with redacted information.
- License Fee Summary** section with an information icon and text: "The expiration date shown here is for the current renewal cycle only. The updated expiration date will appear when printing the license."
- License Renewals for Texas** table:

License Type	Lic. Number	Exp. Date	State Fee
Premium Finance	[REDACTED]	12-31-2022	\$200.00
- Fee breakdown:
 - Total State Fee \$200.00
 - Sircon Fee \$6.00
 - Processing Fee \$7.85
 - Total Fee \$213.85
- Checkboxes:
 - I understand that all license renewal fees are non-refundable.
 - I would like to receive email notifications concerning state insurance deadlines, renewal notices, new electronic services and related issues.
- Text: "NOTE: You will not be charged the above amount until you complete the payment process. If you wish to continue with this process, please click process below."
- Text: "Please send email notifications to: [input field]"
- Buttons: "Revise", "Process", "Cancel"

Callout boxes on the right side of the page point to the following elements:

- "Review information provided." points to the License Renewal header.
- "Must be checked" points to the Total Fee \$213.85.
- "Supply / Verify Sircon account (Optional)" points to the checkbox for understanding non-refundable fees.
- "Select 'Process'" points to the Process button.

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License Renewal

✔ License Renewal(s) and/or Reinstatement(s) were successfully submitted. Please review the information on this page, and then print the page for your records using the Print link below. To print a license, click the link next to the license renewal (if available).

NEXT I would like to:

- [Attach documents](#) to this application
- [Print](#) this confirmation page

Confirmation Information

Please review this page and print for your records. Note the status and messages below concerning each renewal. If the renewal is Pending, you may check the status of the renewal at a later date with the License Application/Renewal Status Inquiry on the Renewal page. Please write down the Confirmation IDs for this purpose.

State	Lic. Number	Renewal Type	License Type	Confirm. ID	Status	Messages
TX	[REDACTED]	Renewal	Premium Finance	[REDACTED]	Submitted	<ul style="list-style-type: none"> • This license renewal request has been submitted and is under review by the State.

[View License Renewal Result Details](#)

[How do I print my license?](#)

Attach any required documents here.

Review Confirmation ID

The file name of documents attached should be PF Renewal YYYY – description of document (Ex: **PF Renewal 2023-Franchise Tax status**).

Question 12 – Prepare a certification on company letterhead and signed by an officer, partner, or sole proprietor that states that the name, physical address location and ownership currently on file with the Texas Department of Insurance are correct and that the answers given herein are true and correct. Any changes must be completed BEFORE you renew the license (reference FIN161).

Review the **Additional State Requirements** Section along with the information which will be submitted with this Renewal application.

Select "**Done**" to submit this renewal application to the state. Once submitted, the renewal will be reviewed by the state and if complete you will be emailed a copy of the license with the new expiration date. If the renewal has deficiencies, you will be notified by email. If the deficiency requires an attachment to your renewal, reference our tutorial on "Attaching a Deficiency to a Renewal".