

# RegEd CLEARXchange<sup>SM</sup>

REAL-TIME VALIDATION OF CONTRACTING, LICENSING, EDUCATION AND TRAINING, APPOINTMENT, AND REGISTRATION FOR AN INSTANT CLEAR TO SELL<sup>SM</sup>

A critical driver of competitive advantage is agent satisfaction and loyalty. And part of that equation is speed to market – the ability for producers to place new business and receive commission, compliantly, in real time.

Only RegEd CLEARXchange instantaneously validates licensure, appointment, registration, education, and mandated training *at the source* to deliver a real-time “clear to sell.” This includes ensuring that the producer holds the proper credentials, including just-in-time training completions, for the business being placed and commissions being paid. Firms and producers do not have to delay placing business or paying commissions while waiting hours or days for training completion reports to be run or files to be uploaded to external systems.

The RegEd CLEARXchange module comprises out of the box integrations with any / all of the following, depending on client requirements:

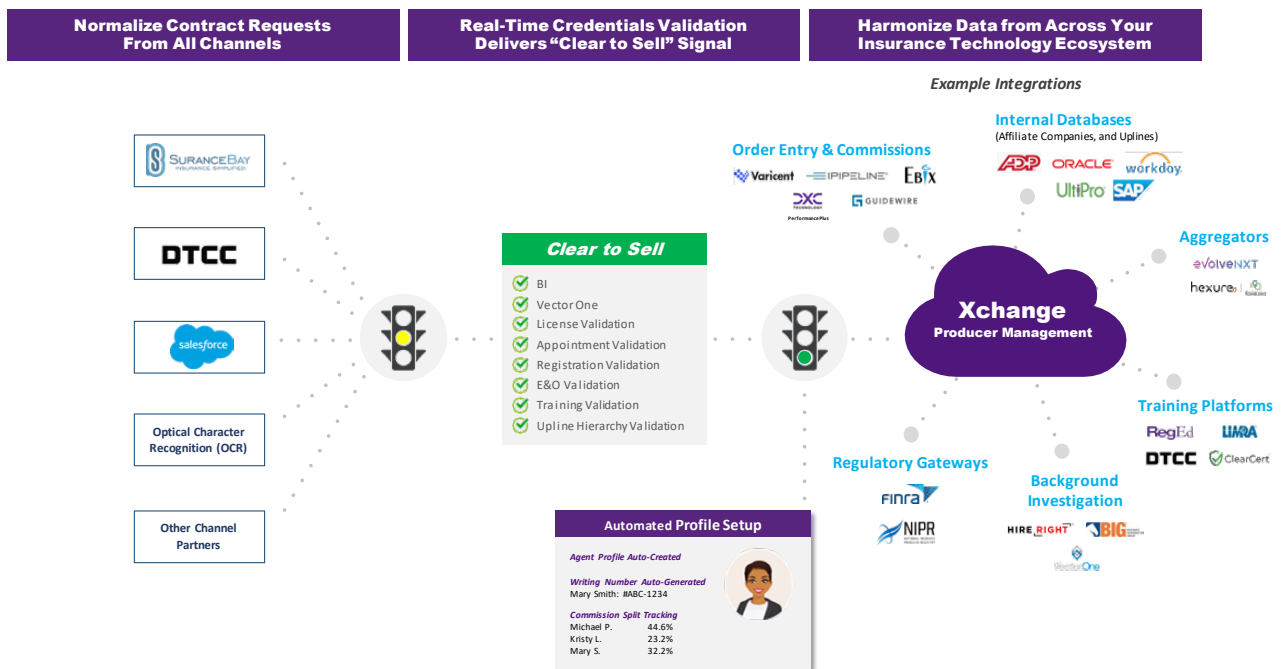
- Client-side order entry / account opening / compensation systems
- RegEd’s Annuities and Industry Training Platform
- Integrations with third-party training providers

Clear-To-Sell Validation

NPN  
 ENTER

| State | Product          | Contract | License | Appointment | Registration | Training |
|-------|------------------|----------|---------|-------------|--------------|----------|
| NC    | Life             | ✓        | ✓       | ✓           | N/A          | ✓        |
| NC    | Variable Annuity | ✓        | ✓       | ✓           | ✓            | ✓        |
| SC    | Life             | ✓        | ✓       | ✓           | N/A          | ✓        |
| KY    | Variable Annuity | ✓        | ✓       | ✓           | ✓            | ✓        |
| OH    | Life             | ✓        | ✓       | ✓           | N/A          | ✓        |
| OH    | Variable Annuity | ✓        | ✓       | ✓           | ✓            | ✗        |

If a new appointment is required, the solution will automatically generate the appointment and validate the completion of any mandatory state, industry and carrier training that is required to sell the product(s). RegEd CLEARXchange will then return a “clear to sell” enabling the business to be placed / commissions to be paid compliantly. RegEd has integrations with more than two dozen commercial solutions, including account opening, order entry, and compensation systems.



● Producer / Rep Sets Up Client Account

● Auto-triggers Credentials Check

● Validates Licensure and Appointment with Xchange

● Generates Missing Appointments

● Validates CE Fulfillment

● Validates Required Training with RegEd ITP, LIMRA and others

● **CLEAR TO SELL**

