

COMPLIANCE SOLUTIONS

FOR THE INSURANCE INDUSTRY



A PROVEN SUCCESS STRATEGY

ReSource Pro Compliance listens to and works with you to understand your needs and expectations. The result is a customized compliance strategy that grows with your insurance business.

THE RESOURCE PRO ADVANTAGE

ReSource Pro Compliance has a diverse team drawn from the insurance, legal, banking, and information technology sectors. Our unrivaled stability allows us to form lasting personal relationships with state regulators, creating a deep understanding of the laws and procedures that shape the insurance and financial services industries.

ReSource Pro offers data-driven insights and comprehensive business process solutions for agents, brokers, MGAs, and carriers.



EXPERIENCE

More than 25 years working with insurance licensing and regulatory compliance.



INNOVATIVE

The leader in using technology to streamline the compliance process.



ACCESSIBLE

24/7 online access to compliance information via the ReSource Pro Compliance Gateway and Surplus Lines Industry Connection (SLIC).

CORE SERVICES



INSURANCE LICENSING

Initial licensing for individuals and entities for all license types and lines of authority in all U.S. jurisdictions, license renewals and continuing education tracking, affiliations, name, and address changes.



SURPLUS LINES FILINGS

Policy filings, premium tax and zero reports, 24/7 access to the Surplus Lines Industry Connection (SLIC) portal for uploading policy information and supporting documents.



CORPORATE COMPLIANCE

Initial business registration with Secretary of State's Offices and Departments of Revenue, name approvals and DBA registrations, Registered Agent services, annual/biennial returns, franchise/foreign corporate tax returns, Director & Officer updates, name and business structure changes, Certificate of Authority amendments, registration withdrawals.



COMPLIANCE REVIEWS

ReSource Pro Compliance offers a fresh perspective and actionable insights on your status with the various state regulatory agencies. Our experts are familiar with the requirements in all U.S. states and American territories. They conduct thorough audits and provide detailed written reports of their findings.

RESOURCE PRO'S SURPLUS LINES CALCULATOR & TAX TOOL

ReSource Pro's Surplus Lines Calculator & Tax Tool (CATT) brings together surplus lines compliance information for all U.S. jurisdictions. With CATT, users can calculate premium tax amounts and stamping fees and access filing and tax payment due dates. They can also view a wide range of state-specific compliance information, including:

- State Stamps
- Required Forms
- Tax Rates
- Stamping Fees
- Export Lists
- State-Specific Filing and Payment Instructions
- Eligible Insurer Lists

FOR MORE INFORMATION

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