

The MGA & Wholesaler playbook for producer licensing

A practical reference for operations managers and compliance officers navigating producer licensing at scale. Use this guide to assess your current program and close the gaps.

MGA licensing complexity checklist

Do you have a centralized system tracking all producer license expiration dates across every state?

Are your DRLP and business entity filings current in all states where you operate?

Do you have a documented process for managing surplus lines licensing and tax filings?

Can you verify active license status for all producers before they transact business?

Is your licensing process documented and scalable for M&A, growth, or restructuring?

License smarter. Onboard faster. Scale with confidence.

ReSource Pro handles every step so your team can focus on growing the business.

The 90-day renewal management framework

DAYS 1-30

Audit & identify

- Pull full license inventory
- Flag expiring licenses
- Verify CE requirements
- Confirm NIPR status

DAYS 31-60

Process & file

- Submit renewal applications
- Resolve discrepancies
- Update carrier appointments
- File change notifications

DAYS 61-90

Confirm & monitor

- Verify renewed licenses
- Update internal records
- Set next cycle reminders
- Report to leadership

Top 5 producer licensing pitfalls for MGAs

- 1 Missing renewal deadlines** across multiple states due to manual tracking and no automated alerts.
- 2 Incomplete carrier appointment management** causing producers to transact without proper authority.
- 3 DRLP and entity compliance gaps** when organizational structures change during growth or M&A.
- 4 Surplus lines tax filing errors** due to complex, state-specific requirements that vary by transaction.
- 5 Licensing bottlenecks during onboarding** that delay producer activation and revenue generation.

How ReSource Pro solves it

PITFALL 1 & 2



Automated renewal tracking

We track every expiration date and process renewals automatically across all states, all license types, all producers.

PITFALL 3



Entity & DRLP governance

Our team manages all business entity filings, officer changes, and DRLP requirements as your structure evolves.

PITFALL 4



Surplus lines specialists

Dedicated experts handle surplus lines licensing, state tax filings, and affidavit compliance so nothing falls through.

PITFALL 5



Faster producer onboarding

Our concierge model eliminates licensing bottlenecks so producers are activated faster and revenue isn't delayed.

Ready to close the gaps in your licensing program?

Talk to a ReSource Pro licensing expert today.

For more information

visit us: resourcepro.com/mga-licensing
call us: 888.577.7552

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