



LICENSING CHECKLIST

Updated as of March 5, 2025. Maintained by the Distribution & Licensing Department of PhilLife.

Note: When filling in any application or form listed below, please do not leave blank spaces.
Write 'N/A' if data is not applicable. All IDs and other images uploaded must be clear representations of the originals.

1. NEW AGENT: TO OBTAIN IC CERTIFICATE OF AUTHORITY (CA)

- ☐ Examination Result (IC or IIAP) (1 page).
- ☐ Accomplished IC Application (4 pages).
- ☐ SSS ID or any SSS Form reflecting name and number. (1 page).
- ☐ TIN ID or TIN Verification. (1 page).
- ☐ ITR in the year immediately prior to joining PhilLife.
- ☐ Filing Fee - P 1,645.00 Invoice (Official Receipt).
- ☐ 2 other valid government-issued IDs, if SSD ID card or TIN card does have embedded pictures.

2. -TO OBTAIN FINANCIAL CONSULTANT (FC) CODE

- ☐ Item 1 as described above.
- ☐ Agent's Recruitment & Selection Profile (ARSP).
- ☐ New Agent's Loyalty Plan (for Group Insurance).
- ☐ FC's Contract.
- ☐ Certification of completion of Agent's Training.
- ☐ 1-piece 2x2 picture. Colored. Attire: Dark colors, corporate. White background.

3. -TO OBTAIN CORPORATE FINANCIAL EXECUTIVE (CFE) CODE

- ☐ Item 1 as described above.

- ☐ Appointment Letter issued by the Head Group Sales and Marketing
- ☐ New Agent's Loyalty Plan (for Group Insurance).
- ☐ Signed CFE Contract.
- ☐ Clearance from immediate previous employer/insurer, if previously employed or engaged as employee or agent of such.

4. TRANSFERRING INSURANCE AGENT TO BECOME AN FC

- ☐ Items 1 and 2 as described above.
- ☐ Clearance from previous insurance company.

5. COME-BACKING INSURANCE AGENT TO BECOME AN FC

- ☐ Items 1 and 2 as described above.
- ☐ Clearance from PhilLife.
- ☐ Recommendation letter from immediate head with approval of Operations Head .

6. NON-LIFE INSURANCE AGENT TO BECOME AN FC

- ☐ Items 1 and 2 as described above.
- ☐ Secretary's Certificate from Non-Life Company authorizing Non-Life Agent to affiliate with PhilLife in the Agent's personal capacity.

7. COME-BACKING INSURANCE AGENT AN FC

- ☐ Items 1 and 2 as described above.
- ☐ Clearance from PhilLife.

8. APPOINTMENT AS SALES DIRECTOR (SD)

- ☐ Items 1 and 2 as described above.
- ☐ Manpower Hierarchy with at least 3 coded FCs .
- ☐ Recommendation letter from immediate heads with approval of Operations Head.
- ☐ Business Plan .

- ☐ Signed SD Contract.

9. APPOINTMENT AS MANAGING DIRECTOR (MD)

- ☐ Items 1 and 2 as described above.
- ☐ Manpower Hierarchy with at least 2 coded SDs w/ 3 FCs each.
- ☐ Recommendation letter from the Operations Head.
- ☐ Business Plan.
- ☐ Signed MD Contract.