

Instructions for Searching Licensee Information <https://searchlicensees.insurancecouncilofbc.com/citizenaccess/>

If after review of the instructions you require further information, please contact Council's Regulatory Services Department by email to [info@insurancecouncilofbc.com](mailto:info@insurancecouncilofbc.com) or phone 604-688-0321, toll-free within BC 1-877-688-0321, and at the prompt press 2.

The following information is **not** available on this website:

1. Licence Applicants - where an application has been received and not Approved

*Note: If you cannot confirm your licence status and it has been more than 10 business days since all of your application requirements have been received by Council, contact our office for further information.*

2. Licences that were terminated prior to **March 1, 2008**
3. History of a licensee's authority to represent an agency/firm
4. General Insurance Trainee registrations.

Licensee Trade Names: You can search Individual and Corporate Legal Names only. You can **not** search by Corporate Trade Name, or Individual Trade Name.

**ATR - Authority to Represent** - Is the record of an individual licensee's authority to represent an agency or firm. To view the details of the licence related to the authority to represent (licence effective date, licence class and licence status), view the licence record of the same class of insurance as the ATR record. An individual may have more than one ATR related to the same Licence record.

**Note to Employers:** Changes are underway to provide employers the ability to export all employee licence information. Check back at a later date for the status of this update.

## FREQUENTLY ASKED QUESTIONS

- How can I get a copy of my licence certificate?
- Where do I find the status of my personal licence?
- Where do I find the status of my corporate licence?
- How do I conduct a search for a licensee by name?
- How do I view my licence details?
- What is my next filing date?
- What is an ATR?
- Why do some licensees have more than one ATR?
- How can I tell if my filing has been processed?
- Where can I see who my nominee is?
- How can I tell if a licensee is under supervision?
- How can I tell if a licensee has conditions on their licence?
- How can I tell if a licence has been suspended or terminated?
- Why do some licensees have more than one ATR?

## Licence Certificates

Council does not issue licence certificates. All public information pertaining to a licence record can be obtained from our website. You can search for licence information on Council's website by clicking the search link to conduct a Search by Contact.

## Search Licensees

### Search Licensees

## Search by Contact

Enter in any of the information you have relating to the licensee you are searching for. You can search by individual name, or an agency or firm's corporate legal name.

### Search by Contact

Contact Type: First: Middle: Last:

--Select--

Corporate Legal Name of Agency/Firm: ?

You may also use the wildcard "%" in your search if you do not know the exact spelling of the name, e.g., %smith.

## Contact Search Results

Search results will contain a list of all records that contain the criteria you searched for.

Clicking on the Licensee Name will provide you with a list of the records relating to the licensee.

Showing 1-5 of 5

First Name	Middle Name	Last Name	Agency/Firm Name	Contact Type
John	Charlie	Smith		Licensee
John-Donald		Smith		Licensee
John	Gerry	Smith		Licensee
John	Henry Scott	Smith		Licensee
John		Smithers		Licensee

If only one record exists that record will be automatically opened.

Licensee, Name: John Charlie Smith

Showing 1-2 of 2

<input type="checkbox"/>	Record Number	Licence/Record Type	Next Filing Date	Status
<input type="checkbox"/>	<a href="#">LIC-2016-0000000-R01</a>	Life Licence - Individual	06/01/2017	Active
<input type="checkbox"/>	<a href="#">ATR-2016-131734</a>	Unaffiliated ATR		Active

\* An **ATR** is the record establishing that an individual represents an agency or firm. Only ATRs that are Active will be listed. An individual may have multiple Active ATRs. Unaffiliated ATRs indicate that an agent is authorized to operate independently.

## Interpreting your Search Results

### Licensee Name

Click on the **Licensee Legal Name/Employer Corporate Legal Name Info** button to view the licensee name.

Record LIC-2016-0000000-R01:  
General Licence - Individual  
Record Status: Active  
Next Filing Date (MM/DD/YYYY): 06/01/2017

Record Info ▾ Licensee Legal Name/  
Employer Corporate Legal  
Name Info

Licensee Legal Name/ Employer Corporate Legal Name Info

Licensee Information	Employer Information
Individual John Charlie Smith	

### Licence/ATR Details

By clicking the **Record Info** button, you can find a variety of information about a licensee, including next filing date, supervisors, and corporate nominees

Record LIC-2016-0000000-R01:  
General Licence - Individual  
Record Status: Active  
Next Filing Date (MM/DD/YYYY): 06/01/2017

Record Info ▾ Licensee Legal Name/  
Employer Corporate Legal  
Name Info

Licence/ATR Details

Licence Termination  
Date/Suspension Date  
(MM/DD/YYYY)

Click on any of the arrows or plus/minus signs to expand or contract the field.

- ▾ More Licence/ATR Information: Trade Name(s), Nominees & Supervisor
- ▣ Licence/ATR Effective Date & Licence Next Filing Date (MM/DD/YYYY)
- ▣ Trade Name(s), Nominee & Supervisor Information

NOMINEES

### Corporate Specific Details

Corporate records include information relating to the corporation and information about the nominee.

**Record LIC-2016-0000000-R01:**  
**General License - Corporate**  
**Record Status: Active**  
**Next Filing Date (MM/DD/YYYY): 06/01/2017**

Record Info ▾	Licensee Legal Name/ Employer Corporate Legal Name
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**Licence/ATR Information - click on the arrow below to view details**

▼ **More Licence/ATR Information: Trade Name(s), Nominees & Supervisor**

☑ **Licence/ATR Effective Date & Licence Next Filing Date (MM/DD/YYYY)**

**CORPORATE LICENCE**  
Licence Effective Date: 11/14/2016  
Next Filing Date: 06/01/2017

☑ **Trade Name(s), Nominee & Supervisor Information**

**NOMINEES**

Name:	John Smith
Role:	Nominee
Date Nominee Added:	11/14/2016

### Individual Specific Details

Individual records display details about the licensee's supervision status. Typically, only life licensees are subject to supervision requirements.

**Record LIC-2016-0000000-R01:**  
**Life Licence - Individual**  
**Record Status: Active**  
**Next Filing Date (MM/DD/YYYY): 06/01/2017**

Record Info ▾	Licensee Legal Name/ Employer Corporate Legal Name Info
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**Licence/ATR Details**

▼ **More Licence/ATR Information: Trade Name(s), Nominees & Supervisor**

☑ **Licence/ATR Effective Date & Licence Next Filing Date (MM/DD/YYYY)**

**PERSONAL LICENCE**  
Date Licence Effective: 11/10/2016  
Next Filing Date: 06/01/2017

☑ **Trade Name(s), Nominee & Supervisor Information**

**SUPERVISOR HISTORY**

Reason for Supervision:	New Agent
Supervisor:	Mary Jane
Supervisee:	John Charlie Smith
Licence Class of Supervisor:	Life
Start Date:	11/10/2016

If a life licensee is subject to supervision requirements, that individual's records will display details about the licensee's supervision status.

**ATR Specific Details**

When viewing an [ATR](#) record, you can see the current level of an agent, and which insurance agency they represent by selecting either the **Record Info** or **Licensee Legal Name/Employer Corporate Legal Name Info** buttons respectively.

*Note: Only active ATRs are displayed. Therefore, you will be unable to check the licence level of an agent with no listed ATRs.*

**Record ATR-2016-000000:**  
**General ATR**  
**Record Status: Active**

**Record Info** | Licensee Legal Name/  
Employer Corporate Legal  
Name Info

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**Licence/ATR Details**

▼ **More Licence/ATR Information: Trade Name(s), Nominees & Supervisor**  
 **Licence/ATR Effective Date & Licence Next Filing Date (MM/DD/YYYY)**

**ATR General Information**  
 Effective Date: 11/09/2016  
 ATR Level: General Agent 2

**Record ATR-2016-000000:**  
**General ATR**  
**Record Status: Active**

**Record Info** | Licensee Legal Name/  
Employer Corporate Legal  
Name Info

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**Licensee Legal Name/ Employer Corporate Legal Name Info**

**Licensee Information** | **Employer Information**  
 Individual | Organization  
 John Charlie Smith | ABC to XYZ and 123 Insurance Agency Ltd.

If an individual works for more than one agency or firm, there will be one ATR for each agency/firm they are authorized to represent.

Licensee, Name: Scott Taylor  
 Showing 1-3 of 3

<input type="checkbox"/>	Date	Record Number	Record Type	Description	Next Filing Date	Status
<input type="checkbox"/>	07/08/2016	<a href="#">LIC-2016-0001407-R01</a>	Life Licence - Individual		06/01/2016	Active
<input type="checkbox"/>	07/12/2016	<a href="#">ATR-2016-00641</a>	Life ATR			Active
<input type="checkbox"/>	07/08/2016	<a href="#">ATR-2016-00637</a>	Life ATR			Active


### Conditions on a Licence

If a Licensee or Agency/Firm has Council Required Conditions on their licence, they will appear like this once you access the record.

Search Licensees

**Record LIC-2016-0000000-R01:**  
**Life Licence - Individual**  
**Record Status: Active**  
**Next Filing Date (MM/DD/YYYY): 06/01/2017**

Record Info ▾	Conditions <b>1</b>	Licensee Legal Name/ Employer Corporate Legal Name Info
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 A notice was added to this record on 11/16/2016.  
Condition: Council-Required Conditions on Licence Severity: Notice  
Total Conditions: 1 (Notice: 1) [View Condition](#)

**Licence/ATR Details**

► **More Licence/ATR Information: Trade Name(s), Nominees & Supervisor**

Clicking **View Condition** will display the details of the licence condition.

Record Info ▾	Conditions <b>1</b>	Licensee Legal Name/ Employer Corporate Legal Name Info
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 A notice was added to this record on 11/16/2016.  
Condition: Council-Required Conditions on Licence Severity: Notice  
Total Conditions: 1 (Notice: 1)

**Conditions**

Showing 1-1 of 1

**Default - 1 Applied**

**Flags**

**Council-Required Conditions on Licence**

*The Licensee is prohibited from soliciting insurance to, or engaging in insurance activity with, any current or prospective client of Burnaby Family Life where the Licensee is employed as an outreach case manager or employed in a similar capacity, until such time as the current or prospective client is no longer a current or prospective client of Burnaby Family Life, respectively, for six months. The prohibition extends to the immediate family of any such client.*

Applied | Notice | 11/16/2016

### Terminated or Suspended Licence



A licence record with a status of Terminated or Suspended will appear like this:

Record LIC-000000C000000R1: General Licence - Individual Record Status <b>Terminated</b> Next Filing Date (MM/DD/YYYY): 06/01/2017		Record LIC-000000C000000R1: General Licence - Individual Record Status <b>Suspended</b> Next Filing Date (MM/DD/YYYY): 06/01/2017	
Record Info ▾	Licensee Legal Name/ Employer Corporate Legal Name Info	Record Info ▾	Licensee Legal Name/ Employer Corporate Legal Name Info

To view more information on the suspension or termination click **Record Info** then select **Licence Termination**

Record LIC-000000C000000R1: General Licence - Individual Record Status: Suspended Next Filing Date (MM/DD/YYYY): 06/01/2017	
<b>1</b> Record Info ▾	Licensee Legal Name/ Employer Corporate Legal Name Info
Licence/ATR Details	
Licence Termination Date (MM/DD/YYYY) <b>2</b>	

Click the arrow to expand the field

Licence Termination Date (MM/DD/YYYY)	
 Licence	
Licence Termination Date (MM/DD/YYYY)	
 ▾ Licence	
Due on TBD <b>Marked as Suspend on 11/10/2015</b>	