

# User Guide to **REINSTATE** a previously held Licence

(includes a Reinstatement + Annual Renewal of Licence)

Updated Apr 22/25

## **IMPORTANT NOTES PRIOR TO BEGINNING AN APPLICATION**

The online application system has recently been enhanced and currently applies to all categories of applicants other than an Amendment to a [Restricted Insurance Agent's](#) (RIA) Designated Official, which requires the completion of a [paper application](#).

To be re-considered for suitability of a Manitoba licence, **all** Reinstatement Applications require detailed answers and documentation as noted in the "[Quick Checklists](#)" attached within this User Guide.

### **Review the ICM website:**

The Insurance Council of Manitoba issues licenses on an equivalency basis (i.e. "Acting Under Supervision" in Ontario would be equivalent to ICM's Level 1 General Licence). Review the required educational requirements prior to applying for a particular licence ([General requirements](#), [Insurance Adjuster requirements](#), [Life/A&S requirements](#)). Should the applicant apply for a General Agent Licence or Insurance Adjuster Licence at a different level than they qualify for, the application will be returned as incomplete.

All applications are reviewed in the order that they are received at the ICM office - no exceptions are given. Applications are typically reviewed **within 7-business days of being received at the ICM office**, however, this could vary depending on the volume of applications received on any given day.

To allow our staff to be as efficient as possible, we ask that you do not contact the ICM office unless you have not received a response by the start of the 8<sup>th</sup> business day.

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## Quick viewpoint of the system

**Applicant** applies for a licence by completing an online application form and providing all documents as requested to determine suitability for the licence.



Applicants will want to review and use this User Guide for assistance with applying online.

**Applicant** submits online application to the "**Authorizer**" (agency/firm/sponsor) for review. Once submitted, questions CANNOT be changed.



**Authorizer** reviews the application in its entirety to determine suitability for a licence by performing their due diligence.



**Authorizer** can perform one of the following:

- Save the application to review at a future time ["**Save**"]. This application has not been submitted to the ICM and is simply saved to review at a future time by the Authorizer.
- Approve the application and send it to the ICM for review ["**Approve**"].
- Send back the application to the applicant for further information ["**Send Back**"].
- Decline the application ["**Decline**"].
- Cancel the application if the applicant no longer wishes to pursue a licence ["**Cancel Application**"].
- Return to the previous screen if you no longer wish to review and/or authorize the application ["**Return**"].



If the application is approved and submitted to the **ICM** ("**Approve**"), the ICM will review it for suitability of a licence. The ICM then has the same options as the Authorizer (**Save, Approve, Send Back** to the applicant for further information, **Decline**, or **Cancel Application**).

Once issued, a confirmation of licensing email will be sent to the new licensee confirming their licence.

Applications automatically EXPIRE within 30 days of inactivity by the Applicant or Authorizer.

## Progress Bar:

The progress bar (as demonstrated below) at the top of your application will provide you with the stage in which your application currently sits.



- “Waiting to Submit” = application is pending with the applicant for information.
- “Pending Authorizer’s Review” = application is with the sponsoring organization to review and submit to the ICM for consideration of a licence.
- “Pending ICM Review” = application is pending with the ICM for review and consideration of a licence.
- “Approved” = application has been approved for a licence. *Note that this does not mean that a licence has been issued. A confirmation of licensing email will be sent to the stakeholder once a licence has been issued, and the licence will be made public under the [Licence Search](#) on ICM’s website.*

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## Notifications:years

Each time an application progresses to a different stage in the process, a notification will be provided to both the applicant and their Authorizer. Notifications can be located within the *bell* in the upper righthand corner as demonstrated below. This allows the applicant and authorizer to always stay up-to-date with the application progress.



Home

Dashboard

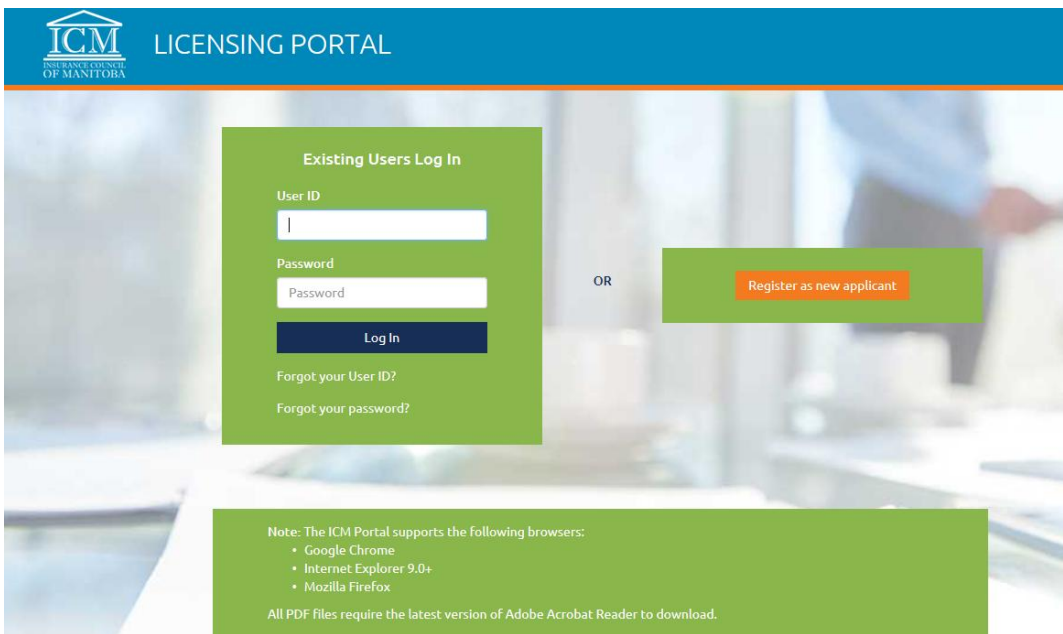
Welcome to the Insurance Council of Manitoba Online Portal

## **Steps to applying for reinstatement of your previously held licence**

- An **Agent** must have previously held a licence within the past 12-months within the insurance class they are reapplying under, to qualify for a reinstatement of the licence.
  - An **Adjuster** must have previously held a licence within the past 36-months to qualify for a reinstatement of the licence.
- 

### **Step 1:** Login with your existing User ID

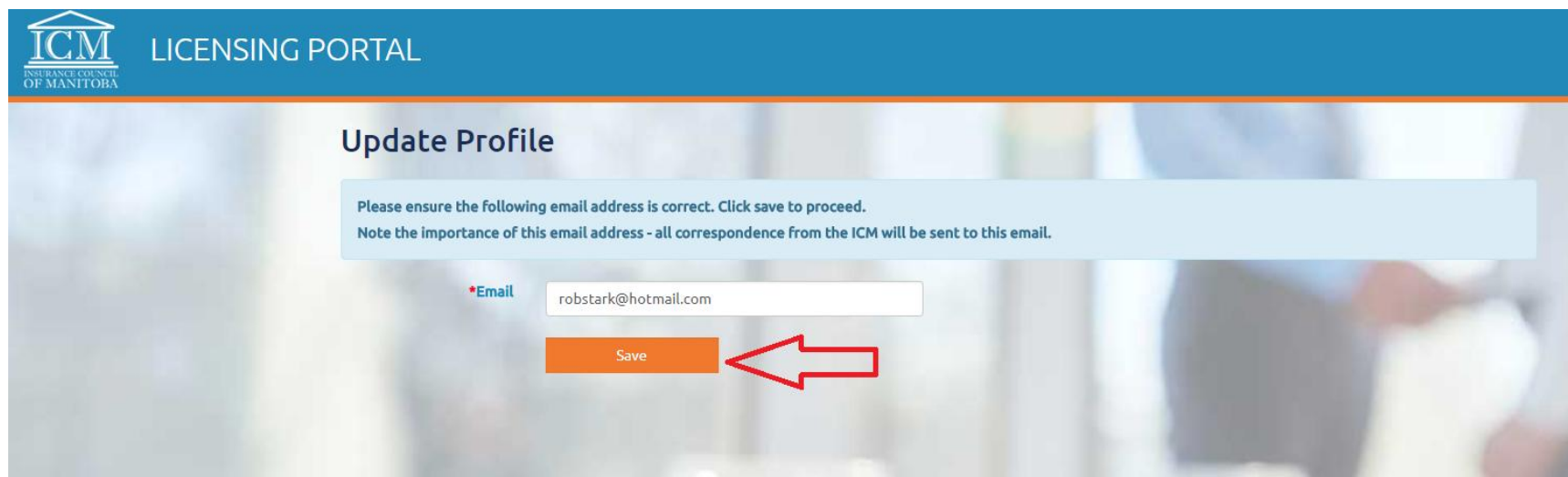
Login within the online portal at <https://lms.icm.mb.ca/lcmPortal/>.



The screenshot shows the ICM Licensing Portal login interface. At the top left is the ICM logo with the text 'INSURANCE COUNCIL OF MANITOBA'. To its right is the header 'LICENSING PORTAL'. The main content area features a green box titled 'Existing Users Log In' containing fields for 'User ID' and 'Password', a 'Log In' button, and links for 'Forgot your User ID?' and 'Forgot your password?'. To the right of this box is an 'OR' separator and a green box with an orange button labeled 'Register as new applicant'. At the bottom, a green box contains a note about supported browsers (Google Chrome, Internet Explorer 9.0+, Mozilla Firefox) and a requirement for the latest version of Adobe Acrobat Reader to download PDF files.

## **Step 2:** Verify your Email Address

Note the importance of this email address – all correspondence from the ICM will be sent to this email, including annual licence renewal reminders, E&O reminder notices, Disqualification notices due to not updating your E&O, Council Report/Newsletter information, etc.



ICM  
INSURANCE COUNCIL  
OF MANITOBA

LICENSING PORTAL

### Update Profile

Please ensure the following email address is correct. Click save to proceed.  
Note the importance of this email address - all correspondence from the ICM will be sent to this email.

\*Email

Save

**Step 3:** Finding where to apply once logged in

Click on “**Applications**” then “**New Application**” to apply. *Note: if you already have an application underway, click on “**My Applications**” to view this application and make changes if the application is currently pending with you.*

The screenshot displays the 'Agent's Dashboard' of the Insurance Council of Manitoba Licensing Portal. The top navigation bar includes the ICM logo and the text 'LICENSING PORTAL'. The user is logged in as 'Rob Stark'. The dashboard is divided into several sections:

- Left Sidebar:** Contains navigation links: Home, Information, Applications (highlighted with a red arrow), My Applications, New Application (highlighted with a red arrow), Exams, and Payment.
- Central Area:**
  - Licence Status:** A section with a sun icon showing counts for 'Application (In Progress)' (1), 'Issued' (0), and 'Renewal' (0).
  - Exams:** A section with a pencil icon showing counts for 'Results' (0) and 'Scheduled' (2).
  - Errors & Omissions:** A section with a checkmark icon showing 'No result'.
- Right Sidebar:**
  - Account Balance:** A section with a dollar sign icon showing 'Licence Fees' and 'Exam Fees' both at \$0.00.

**Step 4:** Applying for a **Reinstatement** of your previously held licence (includes a Reinstatement + Annual Renewal if you did not renew this past renewal) vs. Applying for a **New** Licence, an **Amendment** of your current licence(s) or an annual licence **Renewal**

- An **Agent** must have previously held a licence within the past 12-months to qualify for a reinstatement of the licence.
- An **Adjuster** must have previously held a licence within the past 36-months to qualify for a reinstatement of the licence.

If you have not held a licence for over 12 months **in Manitoba**, or have never held a licence **in Manitoba**, or wish to apply for a supplementary (additional) licence **in Manitoba** for the same insurance class, you would answer the question below of “What would you like to do today?” with “Apply for a New Licence” and follow the steps in the [User Guide for NEW Applicants or those applying for a SUPPLEMENTARY licence](#).

## Application For Licence

What would you like to do today?

- ☐ Apply for a **New Licence**
- ☐ Apply for an **Amendment**
- ☒ Apply for a **Reinstatement**
- ☐ Apply for a **Renewal**

Continue

Refer to the [User Guides and FAQs](#) for assistance.

### Application Status

All Applications are reviewed in the order that they are received at the ICM office - no exceptions are given. Applications are typically reviewed within 7-business days of being received at the ICM office, but this could vary depending on the volume of applications received on any given day. Please refer to the progress bar (located at the top of your application) to determine which party in the process is currently reviewing your information:

- “Waiting to Submit” = application is pending with the applicant for information.
- “Pending Authorizer’s Review” = application is with the sponsoring organization to review and submit to the ICM for consideration of a licence.
- “Pending ICM Review” = application is pending with the ICM for review and consideration of a licence.
- “Approved” = application has been approved for a licence.

**Note:** Once the licence is issued, a confirmation of licensing email will be sent to the new licensee confirming their licence.

Refer to the [User Guide](#) to assist you with the process and change in progress bar. Please do not contact the ICM office for a status update **unless the application has been “Pending ICM Review” for over 7-business days.**



## **Reinstatement + Annual Renewal Additional Information:**

### **Fees/Payment:**

- A **Reinstatement + Annual Renewal** will require two (2) fees as per Regulation [73/93](#). The “Reinstatement” Fee is \$70.00 per licence and the “Annual Renewal” Fee is listed under “Agent’s licence” or “Insurance adjuster’s licence” within this regulation, and is contingent upon your class and in some cases your level. When you choose “Apply for a Reinstatement” as sampled on the previous page, the system will automatically add the two (2) fees per licence together at the bottom of the online application.

### **Continuing Education Credit Hours:**

- Refer to the [Continuing Education page](#) on the ICM website for Requirements and Definitions
- Depending on your resident jurisdiction, if you are required to meet the ICM’s annual continuing education credit hour requirement, you would need to enter your credit hours within your online portal PRIOR to submitting your application to the ICM office for consideration of a reinstatement + renewal of your licence. Once you have met the annual requirement, a green check mark will appear under your CE Status tab. If you fail to meet the requirement, a red exclamation mark will remain. Sample screen below:

#### **Continuing Education Status**

Show  entries Search

	Year	Insurance Class	Required	Required After Reduction	Carry Fwd fr. Prev. Year	Total	Carry Fwd to Next Year	Requirements Met
<a href="#">View</a>	2019-2020	Life and/or A&S	15.00	15.00	0.00	1.50	0.00	!
<a href="#">View</a>	2018-2019	Life and/or A&S	15.00	15.00	0.00	15.00	0.00	✓
<a href="#">View</a>	2017-2018	Life and/or A&S	15.00	0.00	0.00	16.00	0.00	✓

- Failure to meet the annual requirement would result in a delay in the issuance of your licence.

### **Insurance Adjuster specific information:**

- If you are reapplying for your licence after 12 months but within 3 years, you are also required to upload a copy of your criminal record check within the online application process.
- Details on [criminal record check qualifications](#) are outlined on the ICM website.

**Step 5:** Educational Requirements in Manitoba

- The Insurance Council of Manitoba issues licenses on an equivalency basis (i.e. “Acting Under Supervision” in Ontario would be equivalent to ICM’s Level 1 General Licence).
- Review the required educational requirements prior to applying for a particular licence.
- Should the applicant apply for a General Agent Licence or Insurance Adjuster Licence at a different level than they qualify for, the application will be returned as incomplete.
  - [Life and accident & Sickness education requirements](#)
  - [General education requirements](#)
  - [Adjuster education requirements](#)

**Step 6:** Determine who you are applying with

User chooses the **Insurance Class** they are wishing to reinstate as noted below in [Screen #1](#) (only previously held licenses meeting the timeline criteria noted under Step 4 above will display in the insurance class drop-down menu). They would then choose the **Licence Class**, **Agency/Adjusting Firm** and/or **Sponsor** as noted on the following page in [Screen #2](#), and would proceed to the next page by clicking Continue.

**Important Note: a change to your agency/firm and/or sponsor name cannot be made once the application has been submitted. This type of change can only be made by cancelling the existing incorrect application and submitting a new fully and correctly completed application form.**

[Screen #1:](#)

## Application for a Reinstatement of a Licence

The online application system has been enhanced and currently applies to all categories of applicants other than an Amendment to an RIA Designated Official. This type of application must be completed by paper format.

 [Refer to the User Guides and FAQs](#) for assistance.

\*Insurance Class

Back

Continue

## Screen #2:

The previously held licence(s) would be listed and the applicant would choose the licence(s) to reinstate. The system also allows the “**Change my licence class**” checkbox for General and Adjuster in case they are requesting a different level to be reclassified to.

*If you are applying with an organization that is not found in the search fields, contact the ICM office at [contactus@icm.mb.ca](mailto:contactus@icm.mb.ca). ICM can then confirm that you have incorporated your legal agency/firm name and/or registered your agency/firm name with the [Manitoba Companies Office](#) before allowing you to proceed in the online system. If the name is not on file with the [Manitoba Companies Office](#), the ICM will not allow you to proceed.*

## Application for a Reinstatement of a Licence

The online application system has been enhanced and currently applies to all categories of applicants other than an Amendment to an RIA Designated Official. This type of application must be completed by paper format.

 Refer to the [User Guides and FAQs](#) for assistance.

\*Insurance Class

GENERAL

Licence(s) to be Reinstated

Licence Class	Previous Licence Number	Year	Previous Agency	Previous Sponsor
<input checked="" type="radio"/> GENERAL AGENT/BROKER 1	F-555555-6767676767-2019	2019	DEF Insurance Agency Inc.	

Change my licence class ☒

GENERAL AGENT/BROKER 2

Agency/Adjusting Firm\*

Game of Thrones Insurance Agency Ltd.

Direct Writer ☐

Back Continue

If you are applying with an organization that is not found in the search fields, please contact the Insurance Council of Manitoba at [contactus@icm.mb.ca](mailto:contactus@icm.mb.ca) and provide the full name (legal and trade name(s)) of your organization that you are searching for.

## Step 7: Consent and Declaration before proceeding

User must VERIFY the licence they are wishing to reinstate, complete the **Consent and Declaration** section by checking off the boxes and click CONTINUE.

*Note: If the User needs to make a change, they can click the “Back” button before proceeding to the application. Once the application is started under a particular agency/firm name and/or sponsor name, a change to the agency/firm name or sponsor name cannot be completed, and a new application would be required.*

## Application Verification

Review the information below to ensure you are applying for the correct *Licence* and with the correct *Agency* and/or *Sponsor*. You cannot edit the licence class after creating an application. If you wish to edit the information, you must delete the application and create a new one.

Rob Stark (555555)

### Licence(s) to be Reinstated

Reinstate Licence - F-555555-6767676767-2019

#### Licence Class

GENERAL AGENT/BROKER 1

#### Agency

DEF Insurance Agency Inc.

#### Sponsor

None

### Application Licence

#### Licence Class

GENERAL AGENT/BROKER 2

#### Agency

Game of Thrones Insurance Agency Ltd.

#### Sponsor

None

### Consent and Declaration

- ☐ I consent to the manner in which the Insurance Council of Manitoba (ICM) will collect, use, disclose or otherwise maintain the information provided in this licence application. The information requested is collected under the authority of, and used for, the ICM administration of the Insurance Act, its Regulations, its Rules and Codes of Conduct.
- ☐ I understand that by applying for the Insurance Licence, information may need to be collected from other sources such as the agency with which I am affiliated, insurer/sponsor of the licence, financial service regulators, insurance licensing regulators, other insurance associations, credit bureaus, insurance companies, bankruptcy offices, and governments of other provinces. I understand that any documents obtained as part of this application may be shared with my sponsor or other Regulators.
- ☐ I have not acted, and will not act, or offer or undertake to act, as an insurance agent in this province without having first obtained a licence under The Insurance Act.

Back

Continue

## Step 8: Completion of Application Form

User now completes the application form, answering all questions in full and providing documents where requested. In the sample below, Rob Stark chose to reinstate his Level 1 General Licence but is now applying for a Level 2 General Licence (this is due to additional industry education that he has completed and will upload with the application).

**Full and complete disclosure of information is required or could result in a delay of the application, and ultimately the application being cancelled or declined for incomplete information.**

**Once the application is submitted to the Authorizer (Sponsoring Organization), an applicant's answer to a question CANNOT be changed. If a change is required, the applicant will receive the application back ["*Pending Change by Applicant*"] and will be required to provide this information as a COMMENT. The applicant *may* also be required to provide uploaded material.**

### Application for a Reinstatement of a Licence

Your session will remain active for a period of 20 minutes and then expire due to inactivity. Therefore, please save any data you may have entered before refreshing the page or going away from your device.

Waiting to Submit		Pending Authorizer's Review		Pending ICM Review		Approved	
Application Type	Licence Reinstatement Application	Licence(s) to be reinstated	GENERAL AGENT/BROKER 1				
Type	Agent	Applicant's First & Last Name	Rob Stark	Applicant's Middle Name	Jon		
Date of Birth	Dec 25, 1500	Insurance Class	GENERAL	Licence Class	GENERAL AGENT/BROKER 2		
Agency	<input type="text"/>						
Created	Submitted		Last Status Updated				
▲ Personal Information							
Line 1	555 Winterfell Avenue		Line 2	The North		City	Winterfell
Province			Country	Canada		Postal Code	
Phone	555-555-5555		Primary Email	rob.stark@winterfell@gmail.com			
▲ Address where you do business							
Copy Personal Address							
*Line 1	<input type="text"/>	Line 2	<input type="text"/>	*City	<input type="text"/>		
*Province	<input type="text"/>	*Country	<input type="text"/>	*Postal Code	<input type="text"/>		

### **Step 9:** Uploading of Documents and Payment

- User uploads all necessary documents, makes payment via credit card (VISA or MasterCard only) **or** indicates that the company will be paying for them (Company can pay by VISA or MasterCard, or by prepaid cheque to the ICM), and clicks “**Submit**”.
- The application is then sent to the primary authorizer (“Authorizer”) with the insurer or agency/firm for review.
- The Authorizer will then review the application and can either send the application back to the Applicant for changes or additional items, or simply submit the application to the ICM for review.

### **Important Notes about Payment:**

- Payments are kept on hold as a pre-authorization until the licence has been issued by the ICM.
- A receipt can only be viewed by the applicant once the service is rendered (a licence has been issued) by the ICM. Receipts for pending applications will not be provided.
- If an application is “Cancelled”, “Declined” or “Expired”, the pre-authorization payment is released back onto the credit card or added back into the company account if paid by a credit on account.

The screenshot displays the 'Payment' section of an application form. It includes a table with the following details:

Application Fee	Payment By
\$70.00	Applicant

Below the table, there are three buttons: 'Save', 'Submit', and 'Return'. A red arrow points to the 'Submit' button. Another red arrow points to the 'Application Fee' of \$70.00. A third red arrow points to the 'Payment By' dropdown menu, which is currently set to 'Applicant'. At the bottom of the form, there is a copyright notice: 'COPYRIGHT © 2018 INSURANCE COUNCIL OF MANITOBA. ALL RIGHTS RESERVED.'

## **Quick Checklist - Life and/or Accident & Sickness Licence**

- ☐ Fully completed online application. Keep in mind that the organization you are applying with **must** coincide with how you wish to conduct insurance business in Manitoba. Refer to Section 391 of *The Insurance Act*.
- ☐ Primary Email address is required to receive Council Correspondence. Council's primary form of communication is via email, therefore, it is essential that the Council has a current working email address on file at all times.
- ☐ Description of other employment/additional occupation. Depending on the type of occupation, you may be required to provide the employer's information, your position/title, and full job description.
- ☐ Description of the facts to any "yes" answer under the suitability **Questions** section, including dates and the outcome ensuring copies of any relevant documentation are uploaded.
- ☐ Entry of Professional Liability Insurance (Errors & Omissions). Requirements are outlined within [Regulation 389/87](#) in accordance with section 371(1.1) of *The Insurance Act*.
- ☐ A copy of the applicant's government issued photo identification (Full Legal Name, Date of Birth, and Residential Address must match the information within the online application).
- ☐ Document verification of education and licensing history.
- ☐ ICM accepts criminal record checks (CRCs) issued through the applicant's local RCMP or municipal police department, or through [Sterling Backcheck only](#) when accessed through the Insurance Council of Manitoba's [landing page with Sterling Backcheck](#). CRCs are not acceptable when issued through any other third-party provider. Only applicable to applicants who have not held a Manitoba licence for 12 months or longer, or have had a change to their criminal history. CRC must be current within 6 months. **Residents of other Canadian jurisdictions** and **Residents of the United States** please refer to the [ICM's website](#) for details on whether a CRC is required.
- ☐ Applicants from other jurisdictions **without detailed web-based licence searches** require a certificate of authority/non-resident endorsement form.
- ☐ Supervision Certificate (if applicable in your resident jurisdiction).
- ☐ Copy of the Manitoba Articles of Incorporation and/or Business Name Registration Papers from the Manitoba Companies Office if applying in a Corporate and/or Business name.
- ☐ Payment / Fee of \$70.00 per agent licence in accordance with Regulation [73/93](#) – by VISA or MasterCard, or prepayment to the ICM by cheque or cash.



## **Quick Checklist - General or Auto Only Licence (NOT the Operating Agent of the agency)**

- ☐ Determining what level of licence you qualify for in Manitoba is essential when applying online. We refer you to the [General Insurance Agents Licensing Rules](#) to assist you in determining what Level of licence you as an applicant would be suitable for. For example, an agent/broker acting under supervision in their home jurisdiction would be best suited for a Level 1 licence in Manitoba as per Section 3(1) of the Rules.
- ☐ Fully completed online application. Keep in mind that the organization you are applying with **must** coincide with how you wish to conduct insurance business in Manitoba. Refer to Section 391 of *The Insurance Act*.
- ☐ Primary Email address is required to receive Council Correspondence. Council's primary form of communication is via email, therefore, it is essential that the Council has a current working email address on file at all times.
- ☐ Description of other employment/additional occupation. Depending on the type of occupation, you may be required to provide the employer's information, your position/title, and full job description.
- ☐ Description of the facts to any "yes" answer under the suitability **Questions** section, including dates and the outcome ensuring copies of any relevant documentation are uploaded.
- ☐ Entry of Professional Liability Insurance (Errors & Omissions) is required if the applicant is not covered under the General Agency policy. Requirements are outlined within [Regulation 389/87](#) in accordance with section 371(1.1) of *The Insurance Act*.
- ☐ A copy of the applicant's government issued photo identification (Full Legal Name, Date of Birth, and Residential Address must match the information within the online application).
- ☐ Document verification of education and licensing history.
- ☐ ICM accepts criminal record checks (CRCs) issued through the applicant's local RCMP or municipal police department, or through [Sterling Backcheck](#) **only** when accessed through the Insurance Council of Manitoba's [landing page with Sterling Backcheck](#). CRCs are not acceptable when issued through any other third-party provider. Only applicable to applicants who have not held a Manitoba licence for 12 months or longer, or have had a change to their criminal history. CRC must be current within 6 months. **Residents of other Canadian jurisdictions** and **Residents of the United States** please refer to the [ICM's website](#) for details on whether a CRC is required.
- ☐ Applicants from other jurisdictions **without detailed web-based licence searches** require a certificate of authority/non-resident endorsement form.
- ☐ Payment / Fee of \$70.00 per agent licence in accordance with Regulation [73/93](#) – by VISA or MasterCard, or prepayment to the ICM by cheque or cash.

## **Quick Checklist - Insurance Adjuster Licence (NOT the Designated Representative of the firm)**

- ☐ Determining what level of licence you qualify for in Manitoba is essential when applying online. We refer you to the [Insurance Adjusters Licensing Rules](#) to assist you in determining what Level of licence you as an applicant would be suitable for. For example, an adjuster who requires supervision and/or requires their reports to be approved and/or countersigned in their home jurisdiction would be best suited for a Level 1 or 2 licence in Manitoba as per Section 3 of the Rules.
- ☐ Fully completed online application. Keep in mind that the organization you are applying with **must** coincide with how you wish to conduct insurance business in Manitoba. Refer to Section 391 of *The Insurance Act*.
- ☐ Primary Email address is required to receive Council Correspondence. Council's primary form of communication is via email, therefore, it is essential that the Council has a current working email address on file at all times.
- ☐ Description of other employment/additional occupation. Depending on the type of occupation, you may be required to provide the employer's information, your position/title, and full job description.
- ☐ Description of the facts to any "yes" answer under the suitability **Questions** section, including dates and the outcome ensuring copies of any relevant documentation are uploaded.
- ☐ A copy of the applicant's government issued photo identification (Full Legal Name, Date of Birth, and Residential Address must match the information within the online application).
- ☐ ICM accepts criminal record checks (CRCs) issued through the applicant's local RCMP or municipal police department, or through [Sterling Backcheck](#) **only** when accessed through the Insurance Council of Manitoba's [landing page with Sterling Backcheck](#). CRCs are not acceptable when issued through any other third-party provider. Only applicable to applicants who have not held a Manitoba licence for 12 months or longer, or have had a change to their criminal history. CRC must be current within 6 months. **Residents of other Canadian jurisdictions** and **Residents of the United States** please refer to the [ICM's website](#) for details on whether a CRC is required.
- ☐ A statement, signed by at least three reputable persons resident in the province, as to the applicant's trustworthiness and competency is required under Section 385(3) of *The Act*.
- ☐ Payment / Fee of \$70.00 per licence in accordance with Regulation [73/93](#) – by VISA or MasterCard, or prepayment to the ICM by cheque or cash.

## **Quick Checklist - Restricted Insurance Agent (RIA) Licence**

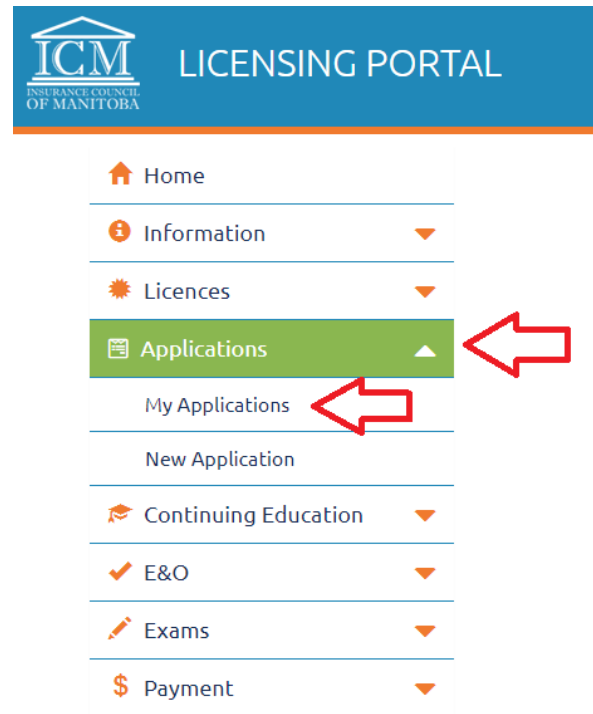
- ☐ Fully completed online application including mandatory sponsorship authorization by an insurer licensed in Manitoba to undertake the class of insurance applied for. Keep in mind that the entity you are applying with **must** coincide with how you wish to conduct insurance business in Manitoba. Refer to Section 391 of *The Insurance Act*.
- ☐ Primary Email address is required to receive Council Correspondence. Council's primary form of communication is via email, therefore, it is essential that the Council has a current working email address on file at all times.
- ☐ Copy of the Manitoba Articles of Incorporation and/or Business Registration from the Manitoba Companies Office. *Not required if member of the Canada Deposit Insurance Corporation or a credit union under The Credit Unions and Caisses Populaires Act.*
- ☐ Entry of Professional Liability Insurance (Errors & Omissions) is required as outlined within [Regulation 389/87](#) in accordance with section 371(1.1) of *The Insurance Act*. *Not required if member of the Canada Deposit Insurance Corporation or a credit union under The Credit Unions and Caisses Populaires Act.*
- ☐ If you are a Designated Official applying for a **Funeral Director** licence or a **Mortgage Broker** licence, you must submit a copy of your licence issued under *The Prearranged Funeral Services Act* or your licence issued through *The Mortgage Brokers Act*.
- ☐ Payment / Fee in accordance with Regulation [73/93](#) – by VISA or MasterCard, or prepayment to the ICM by cheque or cash:
  - 1-4 employees = \$150
  - 5-10 employees = \$225
  - 11-15 employees = \$375
  - 16-20 employees = \$500
  - 21-99 employees = \$700
  - 100-249 employees = \$1,500
  - 250-499 employees = \$3,000
  - 500 or more employees = \$5,500
  - Amendment/Reinstatement = \$70 per licence

## **Quick Checklist - General Operating Agent or Insurance Adjuster Designated Representative Licence**

- ☐ The applicant must qualify for an Operating Agent or Designated Representative licence in their home jurisdiction to qualify for this level of licence in Manitoba.
- ☐ Fully completed online application. Keep in mind that the organization you are applying with **must** coincide with how you wish to conduct insurance business in Manitoba. Refer to Section 391 of *The Insurance Act*.
- ☐ Primary Email address is required to receive Council Correspondence. Council's primary form of communication is via email, therefore, it is essential that the Council has a current working email address on file at all times.
- ☐ Description of other employment/additional occupation. Depending on the type of occupation, you may be required to provide the employer's information, your position/title, and full job description.
- ☐ Description of the facts to "yes" answers under the suitability **Questions** section, including dates and outcome ensuring copies of relevant documentation are uploaded.
- ☐ Entry of Professional Liability Insurance (Errors & Omissions). Requirements are outlined within [Reg 389/87](#) in accordance with section 371(1.1) of *The Insurance Act*.
- ☐ A copy of the applicant's government issued photo identification (Full Legal Name, Date of Birth, and Residential Address must match the information within the online application).
- ☐ Document verification of education and licensing history.
- ☐ ICM accepts criminal record checks (CRCs) issued through the applicant's local RCMP or municipal police department, or through [Sterling Backcheck](#) **only** when accessed through the Insurance Council of Manitoba's [landing page with Sterling Backcheck](#). CRCs are not acceptable when issued through any other third-party provider. Only applicable to applicants who have not held a Manitoba licence for 12 months or longer, or have had a change to their criminal history. CRC must be current within 6 months. **Residents of other Canadian jurisdictions** and **Residents of the United States** please refer to the [ICM's website](#) for details on whether a CRC is required.
- ☐ Applicants from other jurisdictions **without detailed web-based licence searches** require a certificate of authority/non-resident endorsement form.
- ☐ Copy of the Manitoba Articles of Incorporation and/or Business Name Registration Papers from the Manitoba Companies Office if applying in a Corporate and/or Business name.
- ☐ A list of Branch Office addresses, including the name of the General Agent Level 3 or Adjuster Level 4 or 5 Licensed Branch Manager for each office.
- ☐ A list of individuals who will be transacting insurance business on behalf of the agency or adjusting firm in Manitoba.
- ☐ Full particulars, including name, position and contact information, of the owner(s), partners, director(s) or officer(s) of the corporation in order of control.
- ☐ *Adjuster applicants only*: Signed statement from three reputable persons resident in the province.
- ☐ Payment / Fee of \$70.00 per agent licence in accordance with Regulation [73/93](#) – by VISA or MasterCard, or prepayment to the ICM by cheque or cash.

## **View your Application/Documents:** Finding how to view applications and uploaded documents

Click on “***Applications***” then “***My Applications***”.



Click on the drop-down arrow under “Filter” to change your status, and view prior applications. The instructions are also outlined in the blue box below. Within each application that you view, you will be able to view and download your attachments/uploaded documents.

## My Applications

To create a NEW APPLICATION, click on the “New Application” button below.

Select from the “Filter” drop-down box on the right to see any *Approved*, *Cancelled*, *Declined*, *Expired*, or *Pending* applications. Choosing *Active* will bring up any applications that are in active status.

### Application Status

All Applications are reviewed in the order that they are received at the ICM office - no exceptions are given. Applications are typically reviewed within 7-business days of being received at the ICM office, but this could vary depending on the volume of applications received on any given day. Please refer to the progress bar (located at the top of your application) to determine which party in the process is currently reviewing your information:

- “Waiting to Submit” = application is pending with the applicant for information.
- “Pending Authorizer’s Review” = application is with the sponsoring organization to review and submit to the ICM for consideration of a licence.
- “Pending ICM Review” = application is pending with the ICM for review and consideration of a licence.
- “Approved” = application has been approved for a licence.

**Note:** Once the licence is issued, a confirmation of licensing email will be sent to the new licensee confirming their licence.

Refer to the [User Guide](#) to assist you with the process and change in progress bar. Please do not contact the ICM office for a status update **unless the application has been “Pending ICM Review” for over 7-business days.**

Filter

Active

All

Active

Waiting to Submit

Pending Authorizer’s Review

Pending Change By Applicant

Pending ICM Review

Declined

Approved

Cancelled

Expired

Show 10 entries

Search

Ref #	Type	Applicant’s Name	Submission Date (To ICM)	Province	Insurance Class	Agency / Sponsor
No data available in table						

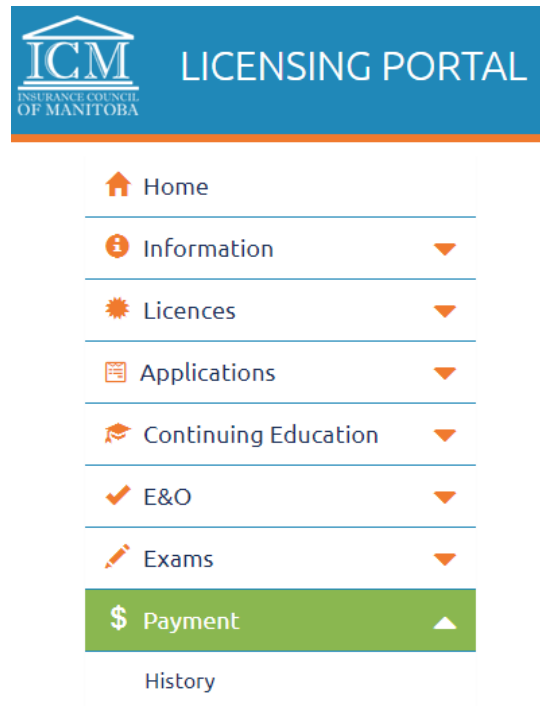
Showing 0 to 0 of 0 entries

New Application

## **View your Payment History/Obtain A Receipt for payment:**

NOTE: Payments are only viewable to the individual that made the payment. i.e. if the payment was paid by the “Company”, then the individual applicant would not be able to see this transaction, but the Authorizer with the “Company” would.

Click on “***Payment***” then “***History***”.



You can then select any search criteria for “Licence Fees” or “Exam Fees” and view your transactions, and obtain downloadable receipts, as sampled in the pictures below.

### Sample Picture #1 - Search:

The screenshot shows the 'Transaction History' search interface. A red arrow points to the 'Account Type' dropdown menu, which is open and shows 'Licence Fees' selected. Another red arrow points to the 'From' date dropdown, which is set to 'March 2019'. A third red arrow points to the 'To' date dropdown, which is set to 'February 2020'. A fourth red arrow points to the 'View' button. The 'Opening Balance' is displayed as '\$0.00 (as of 2019-03-01)'.

**Transaction History**

Account Type: Licence Fees (selected)  
From: March 2019  
To: February 2020  
View

Opening Balance \$0.00 (as of 2019-03-01)

### Sample Picture #2 – Transaction History:

#### Transaction History

Account Type: Licence Fees (selected) From: March 2019 To: February 2020 View

Opening Balance \$0.00 (as of 2019-03-01)

Date	Description	Debit	Credit	Balance	Available Downloads
May 10, 2019 2:43:30 PM	Licence Renewal Payment (Licence(s): AIA-555555-676767676767-2019, LIA-555555-676767676767-2019)		\$240.00	\$240.00	Credit Card Records
May 10, 2019 2:43:30 PM	Licence Renewal Issued (Licence: AIA-555555-676767676767-2019)	\$90.00		\$150.00	Receipt
May 10, 2019 2:43:30 PM	Licence Renewal Issued (Licence: LIA-555555-676767676767-2019)	\$150.00		\$0.00	Receipt

Export to Excel





## Sample Picture #3 - Receipt:



466 - 167 Lombard Avenue  
Winnipeg, Manitoba  
R3B 0T6  
T 204.988-6800  
F 204.988-6801  
website: [www.icm.mb.ca](http://www.icm.mb.ca)  
email: [contactus@icm.mb.ca](mailto:contactus@icm.mb.ca)

### Receipt

#### Licence Renewal Payment

Rob Stark (User ID: 555555)

Total Amount: \$90.00

Transaction #	Transaction Date	Payment For	Description	Amount
2023398	May 10, 2019	Rob Stark (User ID: 555555)	Licence Renewal Payment (Licence: AIA-555555-6767676767 6767-2019)	\$90.00
Total Amount:				\$90.00

\* For payment breakdown, review your online Transaction History page in your account within the ICM's Online Portal.

**Please note this is not confirmation of a licence.**

An applicant for a Manitoba licence is prohibited from transacting the business of insurance and/or acting within the definition of an agent/adjuster/incidental seller of insurance until such time as the Manitoba licence has been processed. Specific notice is sent to the applicant by email if an application is approved and a licence is issued.

#### Return & Refund Policy

Fees are non-refundable once an exam registration is made or a licence has been issued.

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