CIRCULAR LETTER

TO : REGULATED ENTITIES CONCERNED

SUBJECT : GUIDELINES IN THE CONDUCT OF OFF-SITE REGULAR AND SPECIAL QUALIFYING INSURANCE AGENTS' EXAMINATIONS FOR THE CALENDAR YEAR 2018

This Guidelines shall govern the conduct of all regular and special qualifying insurance agents' examinations to be held outside the main office and district offices of the Insurance Commission ("IC").

A. Definition

1. Regular- qualifying insurance agents' examination administered on-site using the IC accredited Agents' Computerized Examination System or off-site in accordance with the schedule attached herein as Annex "A".

2. Special- qualifying insurance agents' examination scheduled and administered off-site by the IC upon the request of the insurance company.

B. Regular Agents' Examination:

1. The conduct of off-site regular insurance agents' examination shall be administered in accordance with the schedule attached herein as Annex "A". All concerned regulated entities shall be notified by this Commission in the event of cancellation or rescheduling of the regular examination.
2. The minimum number of examinees shall be forty (40).

3. All participating regulated entities shall submit a list of names who will take part in the scheduled examination. The list shall be submitted to the Licensing Division via electronic mail at licensing@insurance.gov.ph at least ten (10) working days prior to the scheduled examination.

4. Individuals whose names not submitted in advance shall not be allowed to take the examination.

5. Once the minimum number of examinees are confirmed, the Licensing Division shall issue a corresponding Order of Payment to the participating regulated entities for settlement of the examination fees to be paid at the Cashier Section of the IC Head Office. The amount of One Thousand and Ten Pesos (Php.1,010.00) per examinee and for each type of examination shall be collected as examination fee.

6. Pursuant to IC Circular Letter No. 2014-15 dated 15 May 2014, a copy of the Official Receipt issued by the Cashier Section will be submitted to the Licensing Division for confirmation.

7. The Licensing Division shall assign one (1) proctor for each examination consisting of at least forty (40) examinees. Additional proctor may be assigned if the total number of examinees reached at least one hundred (100).

D. Special Agents' Examination:

1. All requests for the conduct of a Special Insurance Agents' Examination shall be submitted to the Licensing Division via electronic mail at licensing@insurance.gov.ph at least ten (10) working days prior to the requested date of examination.

2. The minimum number of examinees shall be twenty-five (25).

3. The letter request shall include the designated address of the testing site which shall be limited to the requesting insurance company's branch premises or training area. Furthermore, it should also include the exclusive list of examinees and the type/s of examination they will take.

4. Individuals whose names not submitted in advance shall not be allowed to take the examination.

5. Once the request is affirmed and the minimum number of examinees are confirmed, the Licensing Division shall issue a corresponding Order of Payment to the requesting regulated entity for settlement of the examination fees to be paid at the Cashier Section of the IC Head Office. The amount of One Thousand and Ten
Pesos (Php.1,010.00) per examinee and for each type of examination shall be collected as examination fee pursuant to IC CL No. 2014-15 dated 15 May 2014.

6. A copy of the Official Receipt issued by the Cashier Section will be submitted to the Licensing Division for confirmation.

7. The Licensing Division shall assign one (1) proctor for each examination consisting of at least twenty-five (25) examinees. Additional proctor may be assigned if the total number of examinees reached at least eighty (80).

E. Basic Requirements:

1. All examinees must present to the proctor the following documents before the start of the scheduled examination.
   
a. Two (2) copies of duly accomplished application form;
   
b. Two (2) 1x1 picture; and
   
c. Original and one (1) photocopy of the certificate of training from insurance company/association.

2. An examinee with incomplete documentary requirements shall not be allowed to take the examination.

3. Failure to take the examination on the scheduled date shall mean forfeiture of the examination fee.

4. In accomplishing the Answer Sheet, only pens with black or blue ink shall be allowed.

This Circular takes effect immediately.

DENNIS B. FUNA
Insurance Commissioner

Attachment: a/s
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