

Platform Roles

As you onboard members of your agency, use this matrix to be sure you assign the correct permissions.



Compare Roles

	Limited Reporting Admin	Reporting Admin	Roster Admin	Producer	Principal Agent	Producing Principal Agent
Add Limited Reporting Admin			✓		✓	✓
Add Producer			✓		✓	✓
Add Reporting Admin			✓		✓	✓
Create Annuity Applications				✓		✓
Create Illustrations	✓	✓	✓	✓	✓	✓
Create/Update E&O Policy			✓	✓	✓	✓
Resend Invitation			✓		✓	✓
Request Agency Appointments			✓		✓	✓
Request Individual Appointments			✓		✓	✓
Sign Contracting Documents				✓		
Submit Annuity Applications				✓		✓
Take AML & Annuity Suitability Training			✓	✓	✓	✓
Take Product Training				✓		✓
Update Agency Profile Information			✓		✓	✓
Update Producer Profile Information		✓	✓	✓	✓	✓
View Agency			✓		✓	✓
View Agency Appointments			✓		✓	✓
View Annuity Applications	✓	✓	✓	✓	✓	✓
View Commission and Debit Balance			✓	✓	✓	✓
View Hierarchy	✓	✓	✓	✓	✓	✓
View Individual Appointments			✓	✓	✓	✓
View Producer Book of Business Information	✓	✓	✓	✓	✓	✓