EPU California Life, Accident & Health or Sickness License Guide

Your Step-by-Step Guide to Becoming Licensed in California

STEP 1 – Complete Required Education

California requires completion of a 12-Hour Ethics Course and California Insurance Code Course before a license can be issued.

STEP 2 – Schedule & Pass Your State Exam

Take your exam online with a live proctor or at an approved testing center through PSI. Schedule early to create accountability.

STEP 3 – Complete Live Scan Fingerprinting

After passing your exam, complete Live Scan fingerprinting. Resource: https://www.applicantservices.com/cdi/Login?SectionRequested=TransactionPurchase%2F%3Fcbid%3DCAAPP_A0042_CALIFORNIAINSURANCELICENSE

STEP 4 – Submit Your License Application

Submit your application through Sircon: https://www.sircon.com/california

STEP 5 – Monitor Your License Status

Track your application through the California Department of Insurance CLASS system. Approvals generally take about 10 business days.
California Department of Insurance Licensing Hotline: (800) 967-9331

STEP 6 – Download & Print Your License

Download, save, and print your California license after approval. Wait approximately 24 hours before retrieving your NPN if needed.

STEP 7 – Obtain Your NPN Number

NPN Lookup: https://nipr.com/licensing-center/look-up-a-national-producer-number

STEP 8 – Upload Your License to Bamboo

Navigate to New Business > Licensing & Contracting and upload your license, NPN, and effective date.

STEP 9 – Notify EPU Leadership

Notify leadership that your license is approved, NPN received, Bamboo updated, and you are ready for contracting.

STEP 10 – Complete Required Training & Request Appointments

Complete AML, Annuity Best Interest, Long-Term Care, and product certifications, then begin carrier appointments.

EPU License Checklist

☐ Education Completed
☐ State Exam Passed
☐ Live Scan Completed
☐ Application Submitted
☐ License Approved
☐ License Downloaded
☐ NPN Obtained
☐ Uploaded To Bamboo
☐ Leadership Notified
☐ Required Training Completed
☑ Ready To Help Families