AISEVAK.IN · FREE GUIDE

POSP / Agent Setup Guide

Banking, Finance & Fintech

Document type: Licence / statutory filing · Generated 27 Aug 2026

This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

A step-by-step guide to becoming an insurance agent or POSP in India — training and exam, tie-up with an insurer or intermediary, licensing and onboarding — with the trade-offs between agent (single insurer), POSP and broker models and how to get your first clients. Use this to start distributing insurance compliantly.

Purpose of this tool & output

Start distributing insurance compliantly

How the output is used

Use the guide to start distributing insurance compliantly as a Point-of-Sale Person (POSP).

Who receives it

The IRDAI, via the sponsoring insurer/intermediary that certifies the POSP.

How to submit / file it

Complete the POSP training and exam, KYC and sponsor onboarding; the principal supervises and remains answerable.

Fees & charges

Training/exam and onboarding costs; no separate government licence fee.

Who should vet it

The principal officer/compliance officer of the sponsoring entity.

Important cautions

AI-generated guide; confirm current IRDAI requirements.

Companion documents

- Insurance Advisory Framework
- Policy Comparison Helper
- Claim Assistance Guide
- IRDAI Distribution Compliance
- Policy Renewal Management
- Insurance Proposal Writer

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.