Executive Summary: CanSell

Financial professionals often lack timely visibility into whether they are fully licensed, appointed, trained, and ready to sell annuity products. CanSell addresses this friction by creating a standardized way to communicate producer readiness in real time or near real time across carriers, distributors, and industry platforms.

Standard Overview

CanSell is a Digital First for Annuities standard that provides a common API-based approach for sharing licensing, appointment, and training status. The standard is designed to deliver a clear producer eligibility signal inside the tools financial professionals already use, reducing manual follow-up and supporting a consistent build-once, use-many model across the industry.

Key Outcomes

- **Timely Producer Readiness and Faster Issue Resolution**
  Provides financial professionals, distributors, and carriers with real-time or near real-time visibility into licensing, appointment, and training status from authoritative sources, helping identify readiness gaps sooner and resolve issues before the point of sale while reducing delays, uncertainty, and unnecessary follow-up.

- **Reduced Operational Effort and Compliance Risk**
  Decreases reliance on manual lookups, emails, phone calls, spreadsheets, and carrier portals while supporting more consistent eligibility checks and fewer readiness-related NIGO issues.

- **Standardized and Scalable Industry Integration**
  Establishes a common format for communicating producer eligibility, enabling firms to build once and reuse integrations across multiple carriers, distributors, and industry platforms.

Business Champions

- **IRI member firms:** Operations & Technology and Digital First for Annuities participants

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