

PHILIPPINE RETIREMENT AUTHORITY

PROCEDURE:

ACCREDITATION OF MARKETER

SCHEDULE OF AVAILABILITY OF SERVICE:

Monday to Friday 8:00 am – 5:00 pm

WHO MAY APPLY:

1. Single Proprietorship
2. Partnership
3. Corporation
4. Law Firm

DOCUMENTARY REQUIREMENTS:

I. For Initial Accreditation

- Application Form / Marketer Information Sheet
- NBI Clearance for authorized representatives
Police Clearance for overseas authorized representatives (*must be authenticated by the Philippine Embassy/Consulate, and translated to English if necessary*)
- Contract with PRA
- Accreditation Fee of US\$ 300.00 □ Additional Requirements:
 - Business Name and Permit issued by DTI (for Sole Proprietor)
 - Business Name and Permit issued by SEC and Board Resolution/Secretary's Certificate recognizing the application for PRA accreditation (for Partnership / Corporation)
 - IBP License and PTR Number (for Lawyers / Law Firms)
 - PRC License ID (for PRC Members)

- Photocopy of current OEC issued by the POEA (for Overseas Filipino Workers)
- Photocopy of passport showing SRRVisa and PRA ID Card (for PRA Member – Foreign Nationals)
- Photocopy of passport showing valid visa in the Philippines (for non PRA Member – Foreign Nationals) - Business License authenticated by Philippine Embassy / Consulate (for Foreign-based Companies)

II. For Renewal of Accreditation

- Updated Marketer Information Sheet
- Updated NBI Clearance for authorized representatives
- Updated Police Clearance for overseas authorized representatives (*must be authenticated by the Philippine Embassy/Consulate, and translated to English if necessary*)
- Updated contract with PRA
- Renewal Fee of US\$ 150.00

DURATION OF ACTIVITY

(under evaluation)

7 Working Days

PROCESS FLOW 1 – INITIAL ACCREDITATION:

STEP	APPLICANT	SERVICE PROVIDER	PERSON IN CHARGE	FEES	PRA FORM / DOCUMENTS
1	Attend briefing/orientation for PRA accredited marketers	Conduct briefing for prospective and/or new applicants	Market Specialist and Division Chief - Client Relation Division		
2	Submit requirements Admin Division	Evaluate requirements submitted, issue Order of Payment	Processor – Accreditation Unit – Admin Div		
3	Pay accreditation fee	Receive payment, issue Official Receipt	Cashier	Accreditation Fee - US\$ 300.00	Official Receipt

4	Submit Official Receipt to Accreditation Unit	Consolidate requirements and prepare supporting documents	Processor – Accreditation Unit – Admin Div		<ul style="list-style-type: none"> • Endorsement • Certificate of Accreditation • Request for the issuance of ID • Contract
5		Submit documents to Dept. Manager – Admin and Finance,	Processor – Accreditation Unit – Admin Div		
STEP	APPLICANT	SERVICE PROVIDER	PERSON IN CHARGE	FEES	PRA FORM / DOCUMENTS
		for signature			
6		Review documents submitted, approves application for accreditation	Dept. Manager – Admin and Finance and Dept. Manager – Marketing Dept.		
7		Receive signed documents, update database	Processor – Accreditation Unit – Admin Div		
8		Inform applicant about the approved application for accreditation thru email	Processor – Accreditation Unit – Admin Div		
9	Visit PRA Office, receive Certificate of Accreditation, ID, and official sticker	Release Certificate of Accreditation, ID, and official sticker	Processor – Accreditation Unit – Admin Div		
END OF TRANSACTION					

PROCESS FLOW 2 – RENEWAL OF ACCREDITATION:

STEP	APPLICANT	SERVICE PROVIDER	PERSON IN CHARGE	FEES	PRA FORM / DOCUMENTS
1	Attend re-orientation for PRA accredited marketers	Conduct briefing/orientation for PRA accredited marketers	Institute of Retirement, Migration and Ageing (IRMA)		

2	Receive certificate of attendance	Issue certificate of attendance	Institute of Retirement, Migration and Ageing (IRMA)		Certificate of Attendance
3	Submit requirements to Admin and Finance (including certificate of attendance)	Evaluate requirements endorsed, issue Order of Payment	Processor – Accreditation Unit – Admin Div		
4	Pay Re-accreditation fee	Receive payment, issue Official Receipt	Cashier	Re-Accreditation Fee - US\$ 150.00	Official Receipt
5	Submit Official Receipt to Accreditation Unit	Consolidate requirements and prepare supporting documents	Processor – Accreditation Unit – Admin Div		<ul style="list-style-type: none"> • Endorsement • Certificate of
STEP	APPLICANT	SERVICE PROVIDER	PERSON IN CHARGE	FEES	PRA FORM / DOCUMENTS
					<ul style="list-style-type: none"> • Accreditation • Request for the issuance of ID • Contract
6		Submit documents to Dept. Manager – Admin and Finance, for signature	Processor – Accreditation Unit – Admin Div		
7		Review documents submitted, approves application for accreditation	Dept. Manager – Admin and Finance and Dept. Manager – Marketing Dept.		
8		Receive signed documents, update database	Processor – Accreditation Unit – Admin Div		
9		Inform applicant about the approved application for accreditation thru email	Processor – Accreditation Unit – Admin Div		
10	Visit PRA Office, receive Certificate of Accreditation, new ID, and official sticker	Release Certificate of Accreditation, ID, and official sticker	Processor – Accreditation Unit – Admin Div		
END OF TRANSACTION					

