



Broker Demographic Report - Reference Guide

The Broker Demographic Report is a comprehensive report of all brokers that are NM-certified brokers, demographic information, and current certification status.

Frequency: Annually, in advance of Open Enrollment

Location: SharePoint

Column Heading	Req?	Description
license_number	Yes	Broker's New Mexico producer license number (Disregard if blank)
npn	Yes	Broker's National Producer Number (Disregard if blank)
federal_ein	Yes	Broker's agency federal employer identification number (FEIN). Brokers under one Agency will show the same FEIN. Several different Agencies may have the same name with different FEIN numbers. Independent agents will still be set up as an agency of 1 broker. (Disregard if blank)
first_name	Yes	Broker's first name
last_name	Yes	Broker's last name
company_name	Yes	Broker's Agency Name
contact_number	Yes	Broker's primary phone number
business_contact_phone_number	No	Broker's business phone number
your_public_email	Yes	Broker's public email address
certification_status	Yes	Broker's certification status. See table below for permissible statuses.
certification_begin_date	No	Date when the broker became certified. Brokers who become certified on or after 9/11 will be certified for the remainder of the current year and upcoming year (e.g. 9/1/2025 certification date is PY25 and PY26 certified). In general, value will be "N/A" for brokers in an Incomplete, Pending, or Withdrawn state.
certification_end_date	No	Date when the broker's certification ends. For Certified brokers, this date should always be 12/31 since brokers are certified through the end of the calendar year. When a broker's certification ends and becomes "Terminated-Vested" status, the recertify date will be updated to match the end date of the broker's certification. Value will typically be "N/A" for brokers who are not currently in a Certified status.

application_submitted_date	No	Date that the broker submitted a complete registration application. The certification date will always be after the application date. Value may be "N/A" if status is Incomplete or Withdrawn. If this date is prior to 11/1/2020, then the broker preregistered.
last_update_timestamp	No	Date of the most recent change to the broker's profile. The change could be demographic information or certification status.
address1	Yes	Broker's primary address line 1
address2	No	Broker's primary address line 2
city	Yes	Broker's primary address city
state	Yes	Broker's primary address state
zip	Yes	Broker's primary address zip Certification Status Description

Certification Status	Description	Has clients?
Certified	A BeWell-certified broker (i.e. received broker agreement, completed training, and in good standing)	Yes, can have clients

Examples

Name	Certification_status	Certification_begin_date	Certification_end_date	Application_submitted_date	PY 2025 Certified	PY 2026 Certified
Miles	Certified	9/15/2025	12/31/2026	9/15/2025		

Miles became a BeWell-certified broker prior to BeWell's launch on 11/1/2025. Miles has been continuously certified by BeWell since 11/1/2025 through 12/31/2026. Miles has not yet completed their recertification training to continue to be certified in PY26.

Name	Certification_status	Certification_begin_date	Certification_end_date	Application_submitted_date	PY 2025 Certified	PY 2026 Certified
Sandeep	Certified	9/9/2026	12/31/2027	8/5/2026		

Sandeep applied on 8/5/26 and completed certification on 9/9/26. Because Sandeep was certified on or after 9/1, Sandeep was certified for the remainder of PY26 (9/9/26 - 12/31/26) and PY27 (1/1/27 – 12/31/27)