NY State Company Annuity Suitability Training Information

**** As of 6/30/11 required training courses must be completed PRIOR to annuity application solicitation.****

Allianz – 1-877-796-6880
http://reged.com/
- Click on continuing Education
– Annuity Training Platform
– Select #1 Register online.

American Equity – 1-888-221-1234
For Agents that are not active with American Equity - HTTPS://AGENT.AMERICAN-EQUITY.COM/NEWYORK/STATEPRODUCTTRAINING.ASP - Please click on the link below and use your state license number and last 4 of your SS# to access the site.
For Agent that are active with American Equity – https://agent.american-equity.com/StateProductTraining.asp - Use your agent number to take the product training. Each module can be completed in approximately 20 minutes.

American National – 1-888-501-4043 https://img.anicoweb.com/
- Fill in information and click on Begin Presentation.

Athene - 1-800-926-7599
www.atheneannuityny.com/producer
- Click on the PST Training button on the home page.
-Fill out registration page.
-After the registration page is filled out and submitted, you will be able to access and complete the training.

Companion Life- 1-800-867-6873
https://www.mutualofomaha.com/portal_content/wcm_documents/products/annuity-presentation-ny.pdf
-Read through presentation
-To obtain your certificate when you are finished, please visit:
https://www.mutualofomaha.com/portal_content/wcm_documents/products/naic_annuity_suitability_regulation.pdf
-Fill out completion form and return to Mutual of Omaha via mail, fax or email. Instructions are included on the form.

F&G – 1-800-445-6758
Training for Active Agents with the Company:
• Visit SalesLink through www.omfn.com, then enter your user ID and password.
• Click on the "Required Annuity Product Training" drop down box, then select the product training module you would like to take.
• Validate your email address, so we may send you future notices concerning product changes.
• Once you have completed the training module you will be asked to complete a certification stating that you have reviewed and understand both the training material content and agree to comply with the Company's suitability policies and procedures.

F & G
Training for Not Yet Active Agents with the Company:
• Log on to http://www.fglife.com and select the "Producer Required Annuity Product Training" link.
• Log in under the "Not Yet Active Agent" section.
• You will be prompted to provide us with a few details so we can appropriately record your training courses when you become appointed with the Company, and are able to send you future notices concerning product changes.
• Click the "Training Module-Online Certification" column to select the product training module you would like to take.
• Once you have completed the training you will be asked to complete a certification stating that you have reviewed and understand both the training material content and agree to comply with the Company's suitability policies and procedures.
If you have any questions about this annuity training, please contact us at salesmarketing@omfn.com or 1-800-445-6758.

First Ameritas - 1-402-467-7436
http://www.brainshark.com/unioncentral/vu?pi=zFEzQpGLRzHHGz0&intk=304331928
The training is located on Producer Workbench under Sales Resources, Training, Brainshark Presentations,
Annuity Products, and click on NAIC Annuity Training – Non Registered.
Questions: Please contact, Brooke Fine: 402-467-7436
Course is 4 hours.

Genworth – Agents must now complete web training online at www.genworth.com/annuityproducertraining if you have any questions contact Genworth at 1-888-325-5433.

Liberty -
http://reged.com/
- Click on continuing Ed – Annuity Training Platform – Select #1 Register online- Code: Liberty Balance

Lincoln Financial Group –
http://naic.pinpointglobal.com/LincolnFinancial/Apps/default.aspx
Producers can take one course or multiple courses as applicable to the type of annuity business solicited - Fixed - Fixed Annuity - Variable Annuity - SPIA – Single Premium Immediate Annuity

National Integrity – 1-800-824-8742
https://www.kfeducation.com/account/portal-login?redirect=/portal/
Enter Portal Code WSFG
If you do not receive an email from Kaplan, you need to self-register. Before you begin, you need your National Producer Number (NPN). Visit https://pdb.nipr.com/html.PacNpnSearch.html to find your number if necessary.

With your number, go to www.kfeducation.com/portal, enter Portal Code "WSFG" in the "New Users" box, and select "Create Account."

1. A screen will come up with your contact information; complete all fields with a red*. Click "Add User."
2. You will receive an email immediately with your login ID and password. They are the same.
3. Copy your ID and click "Proceed to Portal."
4. On the portal login page, login by entering the Portal Code "WSFG" and pasting your login ID in the Login ED and Password boxes in the current user section. Click "Login."
5. The home page will come up. In the middle of the screen on the right there is a box with a gray header that says "Product Training." In the box click the link that says "Click Here."
6. Click the Product Training Tab under the select product line section, click "Select" then select courses from the list that describes the business you write with us. You can select more than one on this screen.
7. Click "Proceed to Check Out."
8. You will navigate through a series of screens that make it seem like you are getting a course shipped to you. Nothing will come to your home as this is an on-line course delivery method. Just click as follows: continue, checkout, continue, continue, submit order, portal home. In the Product Training section click on "Click Here to Launch Courses."
9. You will see the list of the courses you just selected. Click on the course you would like to complete. A disclosure box will pop up, click "OK."
10. Click "Annuity Product Information

11. Click "Course Name" to bring up training materials. Review them carefully, then close the window.
12. Click "Course Home."
13. In the Review Test section, click "Take."
14. Click "Agree," then "Continue," then "I Agree."
15. Print a certificate if you like, then click "Course Home." A screen will come up with your results.
16. To complete additional courses, click "Portal Home" on the left margin. On the home page, in the Product Training section, click on "Click Here to Launch Courses."
17. You do not need to fax copies of the training certificates to us, it will feed electronically. You may print it for your personal records.

Pacific Life
https://secure.reged.com/TrainingPlatform/

1. Click Link
2. Log in from the box in the upper right-hand corner. If you have not registered with them before, click "sign up".
3. Click the "Go to Requirement" button.
4. If you do not see the Pacific Life Product Training tab, click "Enter Product Code" button on the left-hand side and enter pacificlife in the product code field, then click submit
5. Click "Proceed" Button
6. Click the "Annuities Product Training" Button
7. Product training module is in a PDF file
8. Please review all pages of the training module
9. Click the "Attest" Button to receive credit for completing the course.
10. Read the disclosure and then click the "Certify" button
11. When the certify button turns green, click the continue button to receive your certificate of completion.
12. You can print or save the certificate. Please keep a copy for your records.
13. After you are finished, click the "Close Window" button

Penn Mutual- 1-800-488-9308 – To access the Product Training for Penn Mutual
https://secure.reged.com/TrainingPlatform/

Principal – How to access Principal Life courses
http://naic.pinpointglobal.com/Principal/Apps/default.aspx

Security Mutual- In order to submit a NY application for a Security Mutual Annuity after June 30, 2011, you must first review the Annuity Product Tour. The Product Tour is available electronically on a 24/7 basis. It may be accessed by the following link https://naic.pinpointglobal.com/SMLNY/Apps/Default.aspx. This link will also be available on Security Link. The training is best-viewed using

Internet Explorer 7 or a later version. The training is not available in Mac or Safari environments.

US Life
https://learn.questce.com/naicsuitability

1. If you have not used Quest CE before, you must self-register, by clicking on the "Register" Link on the left of the page, below the Producer Login.
2. After you register, you will see a Welcome screen, which allows you to select "NAIC Credit" or "CE Credit."
   a. "NAIC Credit"—Provides access to product-specific training and the four-hour annuity course (approved in all states where this requirement has been adopted).
   b. "CE Credit"—Provides access to product-specific training and the four-hour annuity course, and the annuity course requirement may be completed for CE credit for a nominal state-imposed "roster charge."
3. On the next screen, select the state for which you must complete the requirement. Choose only one state—if licensed in multiple states, you will have the option to verify that alternate state requirements have been met after the initial course has been completed.
4. IMPORTANT NOTE: If completing course requirements for a state that has not adopted the new requirements or is not listed, click on "Skip Step 1."
5. On the next screen, select "American General Life Companies (AGL and USL)"
6. If affiliated with a broker/dealer or IMO, select that entity from the drop-down list.
7. IMPORTANT NOTE: If you are unaffiliated, or if the entity does not appear on the drop-down list, select "INDEPENDENT/UNAFFILIATED."
8. Click on "Continue."
9. Once you have selected the state, carrier, and affiliation, you will select a list of courses to be added to you profile. Select the appropriate course(s). To complete a course, click "Start." (Each slide displays for a minimum of 15 seconds before you can continue to the next slide.)
10. If licensed in multiple states, at the end of the course, click on "Perform Reciprocity Check." This will display all states within which the course(s) will be recognized as satisfactory completion of those other states' requirements, and will mark those courses as "complete."