



FIELD BULLETIN

MEMO #: 2020-22
Date: March 5, 2020
To: Agency Managers
From: Marketing & Sales Department
Subject: Tips to Find SBLI USA Life Insurance Product Training on RegEd

As a reminder - the SBLI USA Life Insurance Product Training is now live on RegEd.

Tips to access the training:

1. Register online using only the following URL: <https://secure.reged.com/industrytraining>
2. In the “Search by Product Code” box type in the applicable **Product Code** exactly as shown in the box below and click enter
3. Scroll down until you see the training – You will see Prosperity Life Group listed as the company with the specific courses listed below.
4. Click on the applicable course to begin

Product Code
Life Training_NY_Financial Institutions Only
Life Training_NY_Agents Only

If you work with a financial institution you must complete the course titled “Life Training_NY_Financial Institutions Only. All others must choose the course titled “Life Training_NY_Agents Only.

Please note: If you have already completed one of the product training webinars or classroom training, there is no need to complete the training on RegEd.

As always, we thank you for your business.

MEMO #: 2019-75
Date: November 12, 2019
To: Agency Managers
From: Marketing & Sales Department
Subject: Annuity Training and Carrier Appointment Reminder

Prior to soliciting annuity business please be sure that annuity product training has been completed.

If an application on an annuity is taken prior to completion of the training, we will reject the application and ask that you have the application and all supplemental paperwork re-signed and dated after training has been completed. **No exceptions will be granted.**

For your convenience our product training may be taken on RegEd.

You may register online with RegEd at <https://secure.reged.com/industrytraining>. Once registered, please use the product codes below.

Product codes must be typed in exactly as shown in this bulletin to access the training so it will be best to copy and paste the code from this bulletin into RegEd.

The following RegEd product codes are for SBLI USA product training for New York products only:

- Select Choice Product Code: Select Choice_NY
- Safe Solution Product Code: Safe Solution_NY

***As a reminder – For New York sales, Regulation 187 and AML training must also be up to date prior to soliciting business. The Reg. 187 training is also available on RegEd under Course Name - “Best Interest of Clients in Life Insurance or Annuity Transactions: NY Reg 187-1 Hour Course (485_NY).” If your financial institution has reached an agreement with us to provide the AML training, your AML training will be automatically updated; otherwise, you will need to take our AML training, available on the portal.*

The following RegEd product codes are for S.USA (non-NY) product training.

- Select Choice Product Code: Select Choice_nonNY
- Safe Solution Product Code: Safe Solution_nonNY

***As a reminder – For non-NY sales, NAIC 4-hr or similar suitability training as required by your state and AML training must be up to date prior to soliciting business. If you took required suitability training*



through Reg Ed, we will obtain this information through Reg Ed. Otherwise, proof of the suitability training should be provided with your appointment paperwork. If your financial institution has reached an agreement with us to provide the AML training, your AML training will be automatically updated; otherwise, you will need to take our AML training, available on the portal.

Pre-appointment states require a producer to have an approved and effective state appointment with the insurance carrier PRIOR to signing or dating a new business application in that state. If you are writing business in one of these states, please make sure your appointment is active prior to soliciting business.

We currently require pre-appointment in the following states:

- Alabama (AL)
- Florida (FL)
- Georgia (GA)
- Pennsylvania (PA)

As always, thank you for your business!!