

Specific Solutions Regulation 187 Guideline

Carrier	Reg 187 Requirements	Carrier Specific Training	Opt-Out Options	Reg60 Process	New Paperwork Required
Ameritas	RegEd	Thru RegEd Enter Product Code "Ameritas Life Product Training"	No	2 Step	UN2212 NY, UN2162 NY
American National	RegEd, WebCE, Quest CE, Kaplan	Go to website https://img.anicoweb.com/wps/portal/ Click Expert Office, Quick Links, Agent Required Training. If you are appointed click on "go to my learning plan" If not appointed click on "non appointed training" You will have to register and then take the courses.	No		Best interest form and New Life Disclosure
AXA	RegEd, Kaplan, LIMRA	Product Training through URL https://naic.pinpointglobal.com/AXADistributors/Apps/Default.aspx Please select courses for products that you expect to recommend to clients. Courses take approximately 12-15 minutes to complete. Once completed, AXA Equitable's Licensing Team will be notified via overnight file transmission. It may take up to 24 hours for the information to be relayed to the New Business area. Training must be completed by the application date, or the application will be rejected and you must take a new application after training is completed.			Reg 187 Forms with application
Columbian	RegEd, Kaplan				Suitability Information Form #2592 Must complete the Suitability Recommendation on the agent section of the application
John Hancock	RegEd, Kaplan	RegEd: https://secure.reged.com/TrainingPlatform/ Course ID: 19Hancock_01 Title: New York Regulation 187 Product Training Assignment ID: 19JH_01 Product Code/Just in Time Code: JHNY2019		Same Process	New suitability forms
Gerber Life	RegEd, Kaplan				Suitability Questionnaire
Lincoln	RegEd, LIMRA, Kaplan	Lincoln Product training is available thru RegEd, LIMRA, and Kaplan. (See flyer on helpful information)			Life Suitability, Best Interest and Summary Disclosure (LF11943NY)
National Life	RegEd	Product Training on the Agent Portal go to www.nationallife.com log in Go to Training/Product icon. Under Product click on Life. Click and read each training. Click the box stating you read the materials and click Submit			New York Suitability Disclosure Checklist, Disclosure form, Financial Form

Nationwide	RegEd, Kaplan, LIMRA	In addition to the Reg. 187 Advisor training, Nationwide developed Life product training for New York licensed and appointed life advisors to complete prior to solicitation. Nationwide will offer the required courses prior to launch online through RegEd's Annuity Training Platform, accessible at https://secure.reged.com/TrainingPlatform/ . Life product training modules are available for YourLife Guaranteed Level Term, Nationwide YourLife Simplified Whole Life, Nationwide YourLife Whole Life 100 & 20-Pay Whole Life and Nationwide YourLife CareMatters. Life Product training is currently not available for Nationwide® No-Lapse Guarantee UL II, Nationwide YourLife® Indexed UL Accumulator and Nationwide YourLife® Indexed UL Protector. We will communicate further details once these trainings become available. Nationwide will be verifying completion of Life Product specific training courses for applications signed on or after 2/1/2020.			
Principal	RegEd	Product Training https://advisors.principal.com/	Yes		New needs analysis, questions about client's investment goals, net worth, objectives. Signed confirmation of product knowledge,
Protective	RegEd	Product training thru RegEd			Needs analysis, comparison of products, signed suitability questionnaire, signed application
Prudential	RegEd, Kaplan	New Product Training (RegEd or Kaplan) RegEd course numbers 19TERM0100 and 19PERM0100. https://secure.reged.com/industrytraining . Kaplan course 19TERM0100 and 19PERM0100 http://portal.kaplanfinancial.com/partner/prutraining/portal/welcome		No Changes	Collection of additional information, New York attestation will be added to the agent report
SBLI	RegEd	Product Training (RegEd) Product Code: Life Training_NY_Financial Institutions Only Course ID: 20PROS_01 Product Code: Life Training_NY_Agents Only Course ID: 20PROS_02		Additional Forms	Life Suitability Form, Life Product Sales Form, 187 Producer Attestation Update Form (for replacements). If doing an e-signature you must upload the suitability form at the end of the application process by clicking "add new" button or submit to new business by fax or mail
Securian	LIMRA	Product Training (Quest CE) https://learn.questce.com/			187 Supplement Form
Security Mutual	RegEd	New Product Training thru Security Mutual https://naic.pinpointglobal.com/SMLNY/Apps/Default.aspx		2 Step	Right Bridge report or Suitability Statement, Life Insurance Description Form, and replacement paperwork
Symetra	RegEd, Kaplan	Product Training thru RegEd www.symetra.com/training			Individual Life Suitability Profile

Transamerica	RegEd, Kaplan	Product Training (RegEd) Final Expense Training (19TL_01) or Financial Foundation IUL (19TL_02)			Producer Representation Form at time of application
US Life	Kaplan, Quest CE, Success CE, RegEd	Product Training through Kaplan https://portal.kaplanfinancial.com/partner/AIGLIFE OR AIG Website https://naic.pinpointglobal.com/AIGLife/Apps/default.aspx?qa=1	Yes		Product Disclosures, Compensation Disclosures
Western & Southern	RegEd, Kaplan			New Procedures for 1-Step Reg60 Process and 2-Step process in the same	Best Interest Certification, New checklist for producer responsibilities
William Penn	LIMRA, RegEd	Must read the Products at a Glance Bulletin			Best Interest Form

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