

Atlantic Coast

Required Carrier Specific Training (CST) Instructions

Annuity Carrier Specific Product Training and state mandated NAIC Annuity Training (see NAIC Annuity Suitability and Best Interest Standard State Training Requirements for regulation) must be completed prior to soliciting prior to soliciting business. Failure to do so will result in rejected business. Please carefully review the information below and provide a copy of the training certificate to Aegis Financial (contracting@aegisfinancial.com) once completed. If you have completed production training prior to transferring over to Aegis Financial, this training will follow you. For any questions or clarifications, please reach out to your contracting representative at contracting@aegisfinancial.com.

If you will not be participating in solicitation of annuity products with this carrier, you can bypass this CST requirements. Life producers are required to abide by all the rules set in place by the carrier for any additional training requirements. Review ADDITIONAL REQUIRED TRAINING (if applicable) before proceeding.

Annuity Carrier Specific Product Training

Who should complete the product training?

Please see "NAIC Model Regulation Annuity Suitability Requirements" (on next page) to determine if product training is required in a specific state.

When can the product training be taken?

Product training can be taken anytime. Training can be taken the same day new business is solicited.

Product Training Directions:

<https://acl.admin-portal.org/training/>

- Fill in the agent email address and full SSN (if no agent code has been provided) and select Login. If an agent has not previously registered, fill in email address and SSN and select Login, the next page will prompt you to register.
- Once registration is complete, the course page is viewable, and the agent can select which course to complete.
- Once the required training is completed, the certificate will automatically be recorded by the carrier.

Send your certificate of completion to contracting@aegisfinancial.com so we can ensure the carrier has updated the file.

Additional Required Training

Anti-Money Laundering Training (AML):

Oxford Life accepts all AML providers. Training must be completed every three years. Without updated AML training, client applications will not be issued until proof of current AML training can be provided.