

Baltimore Life

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 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?

All agents must complete product training, regardless of state.

When can the product training be taken?

Product training can be completed at any time including same day of new client application.

Product Training Directions:

- Please see the Generation Legacy product specific training instructions below:
 - Go to <https://www.baltlife.com/AnnuityTraining>
- Click the training link for each annuity product and review it in its entirety
- Download a copy of Form 8681, Product Specific Annuity Training Certificate (the tab for downloading the certificate is located on the same webpage on the right side of the screen)
- Complete the certificate in its ENTIRETY (producer printed name, signature and date) and submit the form with the producer's contracting paperwork along with a copy of the 4CE annuity training certificate.

Send complete certification to contracting@aegisfinancial.com

Additional Required Training

Anti-Money Laundering Training (AML):

Unknown