

CL 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, regardless of state, are required to take the product training.

When can the product training be taken?

The training is available at any time and can be dated/taken the same day that business is solicited.

Product Training Directions:

Go to: <https://www.youtube.com/watch?v=vqFEvsvtBvc>

- Sign the PRODUCT TRAINING CERTIFICATION AND ACKNOWLEDGEMENT form located within this document
- Return to contracting@aegisfinancial.com

SURANCEBAY NOTICE: If completing the contracting through SuranceBay, review of the product training module will be provided within the system, including signing of the PRODUCT TRAINING ATTESTATION. The date of completion will be the date that the contract was digitally “confirmed” by the agent.

Additional Required Training

Anti-Money Laundering Training (AML):

All vendors accepted. The most recent date of completion must be within the past 2-Years. A copy of the certificate must be provided along with the agent contract. If AML is not in good standing

order, CL Life will withhold commission payment until proof of acceptable AML has been provided.