

F&G

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 is available at any time and must be taken prior to soliciting business and/or submission of the agent contract.

Product Training Directions:

Go to: <https://training.fglife.com/>

- Existing agent: use "Active Agent" login, New agent: use "Not Yet Active Agent" login
- Complete the registration
- Each product has its own course, select the product that is being sold
- Read the material carefully and then certify that that material was read and understood
- Be sure to select the Attestation Box

Please email certificate or proof of completion to contracting@aegisfinancial.com.

Additional Required Training

Anti-Money Laundering Training (AML):

F&G prefers LIMRA (no certificate required) and SuccessCE for AML training, they will also accept any state approved course. If an agent is wanting to complete an online application for new business, AML needs to be compliant. If an agent is taking a paper application, AML is needed in order for business to issue. AML is required every two years