

Global Atlantic

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?

All agents, regardless of state, are required to take and complete carrier product training.

When can the product training be taken?

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

Product Training Directions:

Go to: <https://www.reged.com/annuities-training-platform/>

1. Log in or Register
2. On the Producer Status page select Enter Product Code
3. Enter the code for the corresponding productProduct Codes
 - a. ForeCare = FTFCARE
 - b. ForeCertain = FORECERTAIN
 - c. SecureFore = SECUREFOREALL
 - d. Income150 = INC150-24
 - e. ForeIncome II = FOREINCOME24
 - f. ForeAccumulation II =FOREACCUM24

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):

Global Atlantic will accept all vendors for AML training. AML must be included in the contracting paperwork when submitted.