

Integrity (Western & Southern)

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?

Only agents in NAIC regulated states must complete product training (see attached Annuity Suitability Training Requirement).

When can the product training be taken?

Product training can be completed anytime; an agent number is not required. Training can be taken the same day new business is written.

Product Training Directions:

Go to www.kfeducation.com/portal and log in using Auto-Registration or Self-registration. Portal Code is **WSFG**.

Return to contracting@aegisfinancial.com

Additional Required Training

Anti-Money Laundering Training (AML):

Accepted providers for AML training are listed below. Renewal for AML training is required every two years. New business will not issue until AML is updated.

Accepted AML providers:

360 training.com LIMRA

Bank/B/D Proprietary National Underwriter

Bankers Edge Quest CE

CEU.com RegEd

FINRA Smart Pro

Fire Solutions STC Interactive

Insurance Company Success CE

Kaplan Surance Bay

WebCE