Legacy (non-GrowthCommander)

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 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.

> **AMERICO**: The training must be taken prior to or the date of the new business sale.
> **AMERITAS:** Agent contracting will not be approved until the product training has been completed.
> **INTEGRITY**: The product training must be taken before the agent contract can be submitted to the carrier. Please

send a copy of the certificate/confirmation email (provided by LMG) to contracting@aegisfinancial.com

Product Training Directions:
Product Training Directions: The training will not be accessible under your personal login until an agent number has been issued but can be taken in advance through the Temporary Product Training Access.

1. Go to http://www.legacynet.com
2. Insurance Professional Login (upper right hand corner)
    a. If active with Legacy- Login or Register

b. If not active yet- select Temporary Product Training Access. Training Access Code: Legacy12

3. Select Product Training
4. Completed the required course (separate course for each product)

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

Additional Required Training

Anti-Money Laundering Training (AML):
LMG will accept AML for the following vendors: LIMRA (see-notice below), FINRA, RegED, WebCE, SuccessCE, Kaplan, SuranceBay, 360 Training and Affordable Educators. AML taken through a non-approved vendor will not be recognized. Insurance company or BD sponsored trainings will not be accepted. Renewal is required every two years. Failure to comply with AML regulations will result in unprocessed business.

LIMRA Notice: AML through LIMRA is acceptable if proof of completion is provided. LMG does not subscribe to LIMRA therefore; cannot obtain electronic transcripts. Please send a “print screen/screen shot” of the “Anti-Money Laundering” tab and the “Resources” tab along with the agent contract. If unable to provide proof, AML through another provider will be mandatory.