

Lincoln

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. States that do not require a 4-hour state training but still require carrier product training include: FL, NY and UT.

When can the product training be taken?

Training is available at any time. Training and new business can be dated the same day.

Product Training Directions:

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

- Login or Register
- On the producer status page select Enter Product Code
- Product code: LINCOLN
- Course title: Lincoln Fixed and Indexed Annuity Training Sept 2022

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

Additional Required Training

Anti-Money Laundering Training (AML):

Lincoln Financial will accept all AML vendors. If the course was taken through any vendor other than LIMRA a copy of the certificate is mandatory. Renewal required every 24-months. If not compliant with AML, Lincoln Financial will terminate the agent contract resulting in loss of access to all client information. AML must be in good standing order before the agent contract will be approved.