Mass Mutual Ascend

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?

Agents can take the training prior to submitting their contract. It must be taken prior to or the same day as the client application. You do not need an agent number in order to take the training.

Product Training Directions:
Go to https://naic.pinpointglobal.com/MMA/Apps/default.aspx

- Log or Register (If registering- under Firm or Broker/Dealer Selection use MassMutual Ascend (All Products))
- Go to My Product Training
- Select the course for the product being written

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

Additional Required Training

Anti-Money Laundering Training (AML):

AML is required yearly. If an agent is not current with AML commissions will be held.
Approved AML providers:
LIMRA WebCE
RegEd FINRA
Kaplan Financial Lincoln Investment Planning
VOYA (formerly ING) National Planning
SWBC Investment Services John Hancock
Wells Fargo Cetera
Quest American Family