

Mutual of Omaha

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?

All agents must complete product training, regardless of state.

When can the product training be taken?

The training can only be accessed once an agent submits contracting, as a producer code is needed to register for the website. A code will be generated within a few days of the submission of contracting to the carrier. Business may be signed and dated on the same day or after product training has been completed.

Product Training Directions:

- Once an agent code has been generated, please go to
 - <https://producer.mutualofomaha.com/enterprise/myportal>
- For new users, select "Sign Up" below the blue "Sign In" button.
- Enter the agent code and follow the prompts to register.
- From the home page of the agent Portal, hover over the "Training and Compliance" tab at the upper right corner. When the drop-down menu appears, select "NAIC Annuity Suitability."
- Select the pertinent training link and review the Power Point presentation provided.
- After reviewing the presentation, complete the Annuity Product Training Certificate and Acknowledgement form and return to Aegis Financial.

Send complete certification to contracting@aegisfinancial.com

Additional Required Training

Anti-Money Laundering Training (AML):

Mutual of Omaha will accept only seven providers for AML training: RegEd, Sandi Kruse, WebCE, Kaplan, SuranceBay, Securities Training Corporations (“AML for Insurance Professionals” course ONLY), and LIMRA. For LIMRA, the most recent EVEN NUMBERED YEAR course is required for compliance, regardless of when the initial course was completed. For the remaining providers, renewal is required every two years from the completion date on the certificate. New business will not be issued until the agent is compliant with AML training.