

Nassau

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 writing annuities are required to complete the carrier product training regardless of state.

When can the product training be taken?

The product training can be taken any time prior to taking an application. You do not need an agent number in order to do the training. It is better to take the training at least the day before you take the application.

Product Training Directions:

Go to: <https://naic.pinpointglobal.com/nassaure/apps/default.aspx>

- New user? Register, Returning user? Sign in with your username and password.
- Select View My Product Training on the home page
 - NOTE: If referring a client to complete the Simple Annuity, training for the MyAnnuity Series product must be completed prior to the date the client signs the application.
- Select Launch for the course that needs to be completed (course will open in a new window).
- For Indexed products- the course INDEXED ACCOUNT TRAINING must be completed along with the specific product course.

Send your certificate of completion to contracting@aegisfinancial.com so we can ensure the carrier has updated the file.

Additional Required Training

Anti-Money Laundering Training (AML):

Nassau accepts AML from RegEd, SuranceBay, The Alliance, WebCe, or LIMRA. (If completing your AML training via LIMRA, it must be a course released on an even numbered year.) AML training is required every two years. Commissions will be held until the AML is up to date and compliant.