National Life Group/LSW

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 soliciting annuities, regardless of state, are required to take the product training module.

When can the product training be taken?
Product training can be taken anytime. Product training can be completed the same day new business is solicited.

Product Training Directions:

See below to choose an option for accessing and completing the training modules:

1. SuranceBay - If the agent contract was done through SuranceBay (SureLC), review of the product training modules will be provided within the system, including signing of the ANNUITY PRODUCT TRAINING CERTIFICATION . The date of completion will be the date that the contract was digitally “confirmed” by the agent.

2. PDF Presentation - Please contact your ECA L&C specialist to obtain a copy of the presentation. To validate the training, the signed ANNUITY PRODUCT TRAINING CERTIFICATION must be returned to contracting@aegisfinancial.com.

3. LSW Website – National Life/LSW Annuity product training is completed through their agent portal: https://www.nationallife.com/
    a. click "Login" and "Agents"

b. When logging into the portal go to "training/product training" button and click "annuity training".
c. Click "product training"
d. There are 4 documents to read through and click "submit" for the at product line.
    i. Code when completed is: NLGA 15 _10

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

Additional Required Training

Anti-Money Laundering Training (AML):
Initial AML training is required through Calsurance and built into the contracting paperwork. AML training is required every two years and the agent will be contacted directly from the provider when it is time for an AML renewal course to be completed. Business will not issue until AML is compliant. Accepted vendors for AML training are: A.D Banker, Cetera, Fire Solutions, Kaplan, LIMRA, National Planning Corp., NY Life Insurance Co, QuestCE, RegEd, Sandi Kruise, SuccessCE, United Insurance Educators and WebCE.