

North American

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

When can the product training be taken?

Product training can be completed anytime; an agent number is not required to access the course.

Training can be taken the same day new business is signed/dated.

Product Training Directions:

Go to: <https://secure.reged.com/TrainingPlatform/>

- Login or Register
- On the Producer Status page select Enter Product Code
 - Charter Plus (FIA) – 24SFGNAC_01
 - Control X (FIA) – 23SFGNAC_02
 - Income Pay Pro (FIA) – 22SFGNAC_02
 - NAC BenefitSolutions (FIA) – 22SFGNAC_01
 - NAC Guarantee Plus (MYGA) – 21SFGNAC_02
 - Performance Choice (FIA) – 20SFGNAC_02
 - NAC VersaChoice (FIA) – 20SFGNAC_01
 - Income (SIPA) – 15SFGNAC_18
 - SecureHorizon / SecureHorizon Plus – 21SFGNAC_03
 - SecureHorizon Choice – 23SFGNAC_01
 - SecureHorizonAccelerator – 24SFGNAC_02

Additional Required Training

Anti-Money Laundering Training (AML):

AML training is required every 2-years. AML is not required to be contracted but is required for a new business policy to issue. North American will accept all AML vendors. If taken anywhere other than LIMRA, a copy of the certificate must be provided along with the agent contract.