

Oceanview

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?

Access to the product training module is available at any time. Completion of the training is a requirement of the agent contract. Oceanview will not submit any state appointment or issue an agent number until the product training has been completed. The product training course can be taken the same day that new business is signed/dated.

Product Training Directions:

Product Training Directions: To review the training presentations, request the PDF from your licensing representative and sign the PRODUCT TRAINING ATTESTATION located within this document. Email the signed Attestation to contracting@aegisfinancial.com.

SuranceBay Notice: If completing the contracting through SuranceBay, review of the product training module will be provided within the system, including signing of the PRODUCT TRAINING ATTESTATION. The date of completion will be the date that the contract was digitally "confirmed" by the agent.

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

Additional Required Training

Anti-Money Laundering Training (AML):

All vendors accepted. The most recent date of completion must be within the past 18 months. A copy of the certification must be provided along with the agent contract. AML is a requirement of the agent contract and Oceanview will not submit the state appointment or issue the agent number until proof of AML has been received.

LIMRA Notice: Oceanview does not subscribe to LIMRA, however, training from LIMRA can be accepted if proof of completion is provided. Please provide a screenshot/print screen of the AML transcript from the website (including course title and status date). If utilizing SuranceBay for contracting, please upload your LIMRA password into the "TRAINING" tab. By doing so, SuranceBay can generate a certificate that Oceanview will accept as proof.