

OneAmerica

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 soliciting annuities or the Asset Care Annuity Funded Whole Life product in NAIC regulated states must complete product training (see attached Annuity Suitability Training Requirement).

When can the product training be taken?

Product Training is available at any time. The training can be taken the day that business is solicited.

Product Training Directions:

Please complete product specific training before writing any business. OneAmerica product training can be completed here: <https://naic.pinpointglobal.com/OneAmerica/apps/default.aspx>

Send complete certification to contracting@aegisfinancial.com

Additional Required Training

Anti-Money Laundering Training (AML):

AML is not tracked or enforced by One America. It is recommended that a copy of the AML Certificate be provided with the agent contract.

Long-Term Care Training Certificate (LTC):

All products are underwritten by LTC therefore, all producers in states that mandate LTC CE must be in compliance and current with the necessary training prior to soliciting business. A copy of the certificate must be provided with the agent contract.