

Reliance Standard

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 is available at any time and must be taken prior to submitting the agent contracting. Reliance Standard will not review or process agent contracting unless the product training is in good order. A copy of the certificate must be submitted to ECA along with the agent contract. Reliance Standard prefers that agents do not solicit business until after the agent appointment/contract is complete. Taking the product training course and writing business on the same day is acceptable however, not preferred.

Product Training Directions:

The training is available through the RegEd Annuity Training Platform.

- Go to: <https://secure.reged.com/TrainingPlatform/>
- Log in or register
- On the Product Status page, select Enter Product Code
- “Enter Product Code” and enter corresponding code
 - Product Code:
 - Eleos, Keystone & Apollo RSL_PSTCOURSE_01
 - Reliance Guarantee RSLI_PST_02
 - Reliance Accumulator RSLI_PST_03

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

Additional Required Training

Anti-Money Laundering Training (AML):

Reliance Standard will accept AML training from the vendors listed below. If the course was taken through another vendor, a copy of the certificate can be submitted for review. Reliance Standard does not track renewals AML training; AML certificate only needs to be provided once. If AML is not in good order, commissions will be held.

LIMRA

RegEd

SuccessCE

QuestCE

WebCE

Kaplan

Fire Solutions

Metlife Securities

Securities America