

## Sentinel

### 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](mailto: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](mailto: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:

Go to website: <https://sslco.admin-portal.org/training/register/>

- Log in/Register with SSN and email
- Complete training
- Print/Save a screen shot of the completion certificate to send in to contracting to verify completion of training (in case the system does not pull through).
- Send a copy of the completion certificate to us for submission to the carrier.

Please email certificate or proof of completion to [contracting@aegisfinancial.com](mailto:contracting@aegisfinancial.com).

### Additional Required Training

**Anti-Money Laundering Training (AML):**

Sentinel does not require an AML certificate be provided. However, the carrier does require the agent to sign as part of the agent contracting paperwork. The agent is certifying that the AML document was read and they will comply with the guidelines. This will need to be re-certified every two years on the Sentinel website.