

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?

Only agents in NAIC regulated states must complete product training. States that do not require a 4-hour state training but still require carrier product training include: FL, MT, NY and UT.

When can the product training be taken?

Product training can be completed anytime. Training can be taken the same day new business is written.

Product Training Directions:

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

- Log in or Register
- On the Producer Status Page select Enter Product Code
- Type in the following code: SIC-SIC
- Select Go To Requirement to open the course. Course name: The Standard's Fixed, Indexed and Immediate Annuity Product Training.
- Complete the course.

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

Additional Required Training

Anti-Money Laundering Training (AML):

The Standard accepts most vendors for AML training but prefers LIMRA (no certificate required). AML is required annually. Business will not issue until AML is compliant