

**Symetra**

### **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 must complete product training, regardless of state.

#### **When can the product training be taken?**

Agents can take the training prior to submitting their contract. It must be taken prior to or the same day as the client application.

#### **Product Training Directions:**

<https://www.symetra.com/training> (turn off pop-up blocker before starting course)

- Training can be taken through RegEd or Kaplan (Kaplan is preferred)
- Instructions for new and existing users for both RegEd and Kaplan are listed on the training
  - page.
  - Each product has its own course (10-15 minutes each).
  - Stride, Select Pro, Select Max: these product trainings are only available on RegEd. If product
    - does not show up automatically- select Enter Product Code and use the following codes:
      - Stride – SYASTRIDE
      - Select Pro or Select Max - SYASELECTPROMAX

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

### **Additional Required Training**

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

Symetra accepts all vendors for AML training. RegEd and Kaplan are the preferred vendors. Once an agent has an account on the Symetra website, they can take a free AML course through RegEd or Kaplan that will feed over to the carrier automatically. AML training is required to be renewed every two years. AML must be compliant before business is written