Allianz

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 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 must complete product training, regardless of state.

When can the product training be taken?
Product training is available at any time. Training and new business can be dated the same day.

Product Training Directions: After agent meets below qualifications product training can be completed. Select the link below to log into the Allianz website and take the training, each product has its own course:

Allianz Qualifications Required

In order for your Allianz contract to be submitted, please provide documentation for one of the following qualifications in order to complete your appointment:

- Masters Club Level Production once in the last five years
- Masters Club Level Production twice in the last ten years
- Minimum of $50,000 in insurance industry commissions from the prior year (1099s in the agent's name, from the carrier, must be provided by the agent)
- Minimum of $500,000 of Fixed Indexed Annuities or Fixed Annuities premium from the prior year (Production statements in the agent's name, from the carrier, and not from the producer's FMO)

- Active Registered Representative (Series 6 or 7 registration) listed on FINRA with a Broker Dealer
- Active Investment Advisory Representative for the last 3 consecutive years (Series 65 or 66 registration)
- Combination of active Investment Advisory Representative and active Registered Representative for the last 3 consecutive years
- Holds one of the following active professional licenses or designations: CFA, CFP, ChFC, CLU, CPA, LUTC or LUTCF (Provide a copy of the active license/designation documentation from the designating body)

Once Qualification is submitted we can submit contracting for processing THEN Product Training can be completed:

Product Training Link

Allianz Life Insurance Company of North America now allows agents to take product training prior to contracting. Below are instructions and Just In Time Codes to be used for each training course. Please remember accessing and completing training is not indicative of background check completions or business processing in good order.

To access the training, go to https://www.reged.com/annuities-training-platform, click on “Annuity Training Platform” and complete the registration process. Once you have registered and logged in to the site you will follow these steps to access the training:

1. Click on “Enter Product Code” on the left list and the Just In Time screen will appear.

2. Enter the Just In Time code in the Product Code box and click on Submit.

3. Just In Time Codes (only for use on RegEd):
Product Training Course Name (At RegEd) Product Code (in caps):

Allianz - 360 Annuity Training (15Allianz_08) ALLIANZ360V2
Allianz - Core Income 7 Annuity Training (15Allianz_04) COREINCOME7V2
Allianz - Essential Income 7 Annuity Training (15Allianz_06) ESSENTIALINCOME7
Allianz - Market Value Adjustment Training (15Allianz_03) MVAV1
Allianz - Retirement Foundation ADV Annuity (16Allianz_05) RETIREMENTFOUNDATIONADV
Fixed - Allianz Accumulation Advantage Annuity (22Allianz_01) ACCUMULATIONV3
Fixed – Allianz Accumulation Advantage Annuity 7 (23Allianz_04) ALLIANZACCUM7
Allianz - Benefit Control Annuity Training (20Allianz_01) ABCANNUITY
Allianz - Allocation Charge Supplemental Training (20Allianz_02) ALLOCATIONCHARGE
Allianz - 222 Annuity Training (20Allianz_03) ALLIANZ222V3
Allianz – Life Pro+ Advantage (19Allianz_01) LPPADVANTAGE
Allianz - Dual Bonus Benefit Rider DBBR
Allianz - NAIC 1 Hour Training - 491
Allianz - NAIC 4 Hour Training - 490

4. After clicking on the submit button, you will see the requirement show up under “Carrier Specific Product Training.” Click on the training and the course will launch.

5. You will receive a certificate of completion for each course completed, you must complete the training for the product(s) you wish to sell only.
If you have already completed product training for this carrier, please disregard this message.

Additional Required Training

Anti-Money Laundering Training (AML):
Allianz will accept LIMRA (no certificate required), RegEd, Sandi Kruise, Success CE, Kaplan, QuestCE, and WebCE. It is required every two years. Failure to complete AML will result in commissions being held. If an agent is registered on FINRA with a Broker Dealer then AML training is not required.