

ibexis

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 will not be soliciting 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 and must be taken prior to soliciting business and/or submission of the agent contract.

Product Training Directions:

Product Specific Training for the FIA Plus, MYGA Plus and WealthDefender annuities is conducted by SuccessCE.

Please follow these specific instructions step-by-step as they are listed below...

1. Go to <https://successce.com/ibexis>
2. Click on the red button that reads “Course Catalog.”
3. The FIA Plus, MYGA Plus and WealthDefender Product Training courses will populate. Select which course you would like to complete.
4. In the powder blue bar, on the right, click on “Add to Cart” (You DO NOT need to Select a State)
5. Click on the orange button that reads “View Cart.”
6. At the bottom of the page, you need to “Log In” OR “Create Account”. If you forgot your password, you could easily reset it here as well.
7. Once you logged in or established an account, click the green button that reads “Complete Your Order.”
8. In the green bar, click on “Click here to access your new course!”
9. Now you are ready to take the course.
10. The course is approximately 28 slides for FIA Plus, 16 slides for MYGA Plus and 24 slides for WealthDefender for you to go through. To advance to the next slide, simply click on the blue arrow on the bottom right.
11. Once you have reviewed all the slides, click the “Submit” button on the top right corner.
12. Now you will be able to get your Certificate of Completion.
13. Please print or save to PDF a copy of your certificate for future reference.

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

Additional Required Training

Anti-Money Laundering Training (AML):

No specifics were shared by the carrier for preferred vendors.