

National Western

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

Product Training Directions:

Product Specific Training is required for agents selling NWL annuity products. The course is offered through RegEd and can be found at to <https://secure.reged.com/TrainingPlatform/>

NWL product training courses currently available on RegEd:

- NWL® Dynamic Series (JIT Product Code: nwldynamic)
- NWL® Impact Series (JIT Product Code: nwlimpact)
- NWL® Lifetime Returns Solutions (JIT Product Code: nwl solutions)
- NWL® Single Premium Immediate Annuity (SPIA) (JIT Product Code: nwlspia)
- NWL Protector One® (JIT Product Code: nwlprotector)
- NWL® Ultra Series (JIT Product Code: nwlultra)

Further, Step by step instructions can be found here: https://enews-edge.nationalwesternlife.com/NWL/DM-1512_RegEd-PST-Instructions.pdf via carrier website.

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

Additional Required Training

Anti-Money Laundering Training (AML):

National Western will accept LIMRA (no certificate required), RegEd, QuestCE, SuccessCE, WebCE, FINRA and Kaplan for AML training. All other vendors will be reviewed by the compliance department. AML is required to be renewed every two years. Contracting will not be completed until AML is compliant.