



USER GUIDE
ANNUITY TRAINING
PLATFORM

RegEd

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1.0 OVERVIEW

As the leading industry platform with several large carriers, RegEd's Annuity Training Platform is the solution for reducing the annuity training burden and keeping producers focused on selling.

- + Producers are able to easily register and meet multiple carrier requirements on one platform, providing access to state suitability and carrier-specific product training courses.
- + Distributors can see an agent's complete compliance profile for annuities training, including both state suitability requirements and carrier-specific product training.
- + Producers can easily maintain compliance with the state suitability requirements for the states in which they sell annuities. The platform has an extensive rule base to determine reciprocity rules and initial and ongoing training requirements.

The main page of the Annuity Training Platform displays a map of the United States. Hover over each state to view basic annuity training requirements or click on the state to view a more in-depth description of each state's requirements and reciprocity rules.

2.0 REGISTRATION AND LOGIN

Users self-register on the RegEd Annuity Training Platform.

The screenshot shows the RegEd website interface. At the top left is the IRI logo (Insured Retirement Institute). To its right is the RegEd logo. Further right is a login form with fields for 'Login Email Address:' and 'Password:', a 'Go' button, a checkbox for 'Save User Name', and a link for 'Forgot my password?'. Below the header is a navigation bar with links: TRAINING PLATFORM >>, RULES AND REGULATIONS, NEWS, CONTACT US, and ABOUT US.

A central banner reads: *Welcome to the industry's largest and most comprehensive annuities training platform. Log in now to experience our real-time reciprocity and requirements tracking engine and meet your training requirements today.*

On the left, a 'Participating Carriers' box lists 'AIG Annuities' and 'Allianz Life Insurance Company of North America'. Below this is a link: 'Click here for a full list of participating carriers.'

The center features a map of the United States with state abbreviations. A legend below the map indicates:

- Dark blue square: Adopted Requirement
- Light blue square: Requirement Pending Adoption
- Grey square: No Requirements Pending Adoption

On the right, a 'Producers Get Started' box contains a 3-step process:

1. Register online and create a profile.
2. Complete your state-mandated annuity training.
3. Complete Carrier-specific courses as they are assigned to you.

Below this is a 'News' section with the following items:

- RegEd Named CE Quality Partner by CFP Board
- RegEd Announces Program for Sixth Annual Client Conference in Hilton Head Island, SC
- RegEd Selected as "Best-in-Class" Solution for 1st Global's Enterprise Empowerment Initiative

At the bottom right of the page is the copyright notice: ©2010-2017 RegEd.

- + **Step 1.** Users go to <https://secure.reged.com/TrainingPlatform/>.
- + **Step 2.** Select Register Online on the right under **Producers Get Started**.
- + **Step 3.** Complete the registration form.



Self Registration

Login Information

The security questions / answers are required to help you reset your password, if you forget your password.

*Login Email: Will be used as Login Name and Contact Email

*Password: (Passwords must be at least 8 characters, and contain at least 2 alphabetic characters and 2 numbers)

*Verify Password:

*Security Question 1: *Answer:

*Security Question 2: *Answer:

*Security Question 3: *Answer:

(You must select 3 different questions and provide 3 different answers which do not match your password.)

Identifying Information

We require your Social Security Number and Date of Birth to process your CE as per state requirements.

Prefix:

*First Name: *Last Name: MI: Sfx:

*Social Security #:

*Verify Social Security #:

*Date of Birth:

*National Producer Number (NPN):

Business Address

*Address Line 1:

Address Line 2:

*City: *State: *Zip Code:

*Country:

*Phone: Ext:

Fax:

Shipping Information

We require your shipping address to send you your certificates as per state requirements.

Same as Business Address I want to enter different Shipping Information

Home Information

Same as Business Address I want to enter different Home Information

Terms of Service

I accept the [Terms of Service](#) and site usage requirements

* Denotes required field



2017-11-21 ABOUT SSL CERTIFICATES

3.0 PRODUCT TRAINING

- Product training is assigned automatically by a carrier through daily data feeds to RegEd or ordered with a product code by the user. Upon login, the Producer Status page displays all currently assigned and ordered carrier-specific product training. The user is also shown their current annuities state suitability compliance summary. To update RegEd with states the user is licensed in, select **Manage My State Suitability Requirements**.

3.1 Assigned Product Training

Assigned product training displays for the user on the main page. Courses are grouped by the carrier and immediately accessible by selecting the **Go To Requirement** button. Assigned product training courses are also accessible from the left frame menu, grouped by Carrier name.

Producer Status

Annuities State Suitability Compliance Summary

State	Resident?	Requirement Met?	Course Status
Ohio	No	N/A - Not Required	
West Virginia	Yes	N/A - Not Required	

Carrier-Specific Product Training

Requirement	Completion Date	Requirement Status
ACME Annuity Product Training		
ACME - Product Training Alpha (ACME_01)		Go To Requirement
ACME - Product Training Beta (ACME_02)		Go To Requirement
ACME - Product Training Gamma (ACME_03)		Go To Requirement

Although RegEd, Inc. takes reasonable steps to ensure that the information displayed through the Annuities Training Platform is current and correct based on the data provided to it, it neither warrants nor guarantees its accuracy or timeliness. Producers should verify their product training and continuing education requirements and status on the websites of the state departments of insurance where they hold licenses and with their carriers, as appropriate.

Select a course and an informational service page will display, then select **Proceed** to begin the course. If the carrier has chosen not to display a service page for the course, the course will begin immediately.

Use the buttons () in the bottom middle of the page to navigate through the course. There is an X button in the top right to leave the course () and return at a later date.

3.2 Enter Product Code

If a carrier has provided a Product Code (or a Just-In-Time code) to access a course, enter the code to immediately add the course as an available option on the Producer Status homepage. The product code can be entered:

- + in the field within the Carrier-Specific Training section
- + by selecting Enter Product Code on the left-side menu and entering the code on that page

After selecting **Submit**, you are returned to the Producer Status page and the new course is listed under the program status grid under Carrier-Specific Product Training.

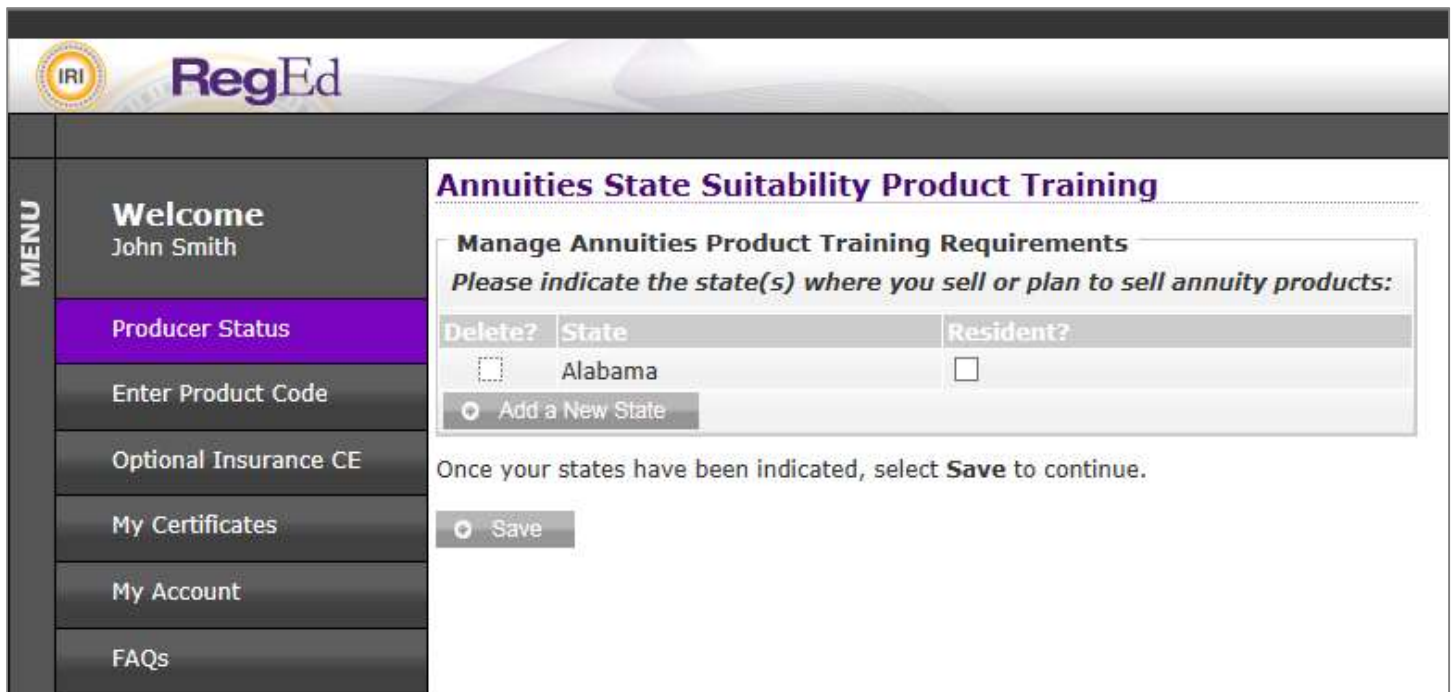
4.0 MANAGE MY STATE SUITABILITY REQUIREMENTS

Users are able to indicate in which states they are licensed. This allows the ATP platform to help the user stay up-to-date on training requirements.

State	Resident?	Requirement Met?	Course Status
Ohio	No	N/A - Not Required	
West Virginia	Yes	N/A - Not Required	

Requirement	Completion Date	Requirement Status
ACME Annuity Product Training		
ACME - Product Training Alpha (ACME_01)		Go To Requirement
ACME - Product Training Beta (ACME_02)		Go To Requirement
ACME - Product Training Gamma (ACME_03)		Go To Requirement

Select the **Manage My State Suitability Requirements** button on the Producer Status page.



Annuities State Suitability Product Training

Manage Annuities Product Training Requirements
Please indicate the state(s) where you sell or plan to sell annuity products:

Delete?	State	Resident?
<input type="checkbox"/>	Alabama	<input type="checkbox"/>

Once your states have been indicated, select **Save** to continue.

- + Use the checkbox under the **Delete** column, then click **Save** to remove a state in which you are no longer licensed.
- + Use the checkbox under the **Resident** column, then select **Save** to indicate you have a resident license in the state.
- + Select the **Add a New State** button to include additional states in which you are licensed.
- + Enter additional information as required by some states in order to ensure training recommendations are accurate.

5.0 STATE ANNUITY SUITABILITY TRAINING

Users are able to gain access to RegEd’s annuities suitability courses designed to meet state training requirements. The user is able to order insurance CE credit(s) with the courses. Course completions are reported to participating carriers on RegEd’s Annuity Training Platform.

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MENU

- Welcome
John Smith
- Producer Status
- Enter Product Code
- State Suitability Training
- Optional Insurance CE
- My Certificates
- My Account
- FAQs
- Forethought Annuity Product Training
- Great-West Product Training
- Nationwide Annuity Product Training
- Sammons Retirement Solutions Product Training

State Suitability Training

New state regulations require that producers complete annuities suitability courses prior to selling any annuity product. State-mandated suitability courses completed on this site are:

- Designed to meet state training requirements
- Available for Insurance CE credit(s). Certification and state fees may apply.
- Reported to participating carriers on the RegEd/IRI Annuity Training Platform

To access RegEd's **State Suitability Training** courses available to you please select the **Proceed** button below.

Select **Proceed** to continue to the My Courses page.

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My Courses

A **Active Courses**

B Course History

Order Instructions:

To order *new* courses or additional CE credits, please click the **Select New Courses and CE Credit** button to view the courses and CE credits available to you.

To access a course that has already been ordered, please select the corresponding **Go To Course** button below.

Before you take the exam, please check the pop-up blocker in your browser and ensure this website is allowed, otherwise you may experience problems completing the exam.

Course Name	Course Status	Course Completion Date
State or Professional Designation CE Status		

E

A. Active Courses

Active Courses shows the courses the user has already ordered. If no courses have been ordered, this area will be blank.

B. Course History

The **My Courses** page allows the user to view their course history and access course completion certificates.

C. Select New Courses and CE Credit

Select this option to begin ordering a course(s).

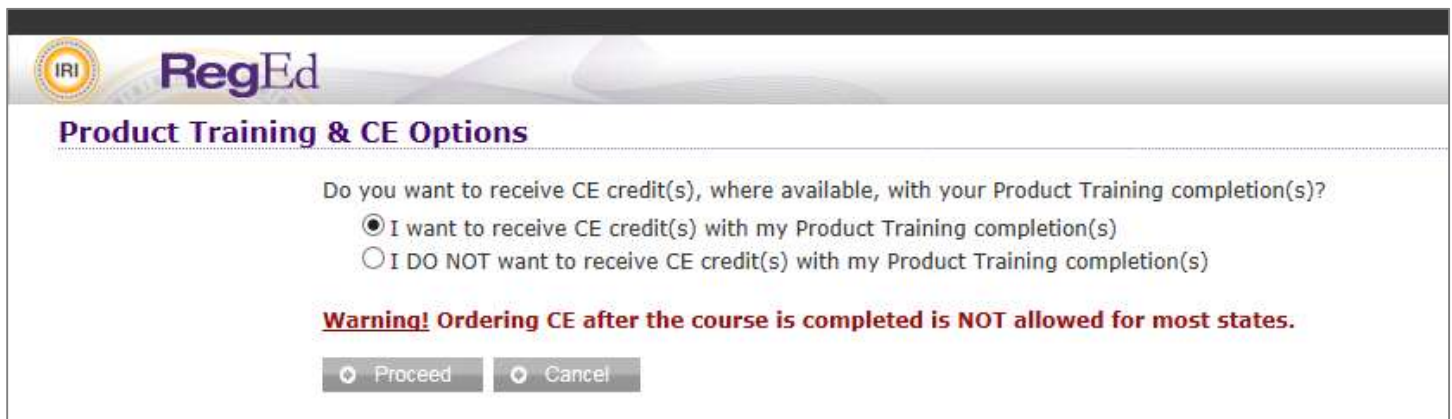
D. Order Additional Insurance Credit

Select this button to order additional CE credit for a course that has already been completed. Note that additional CE orders are subject to state regulations; some states do not allow CE to be ordered after a course has already been completed.

E. Courses Ordered

Courses already ordered or in progress are displayed here with an option on the right to **Go To Course**.

Click on **Select New Courses and CE Credit** to order state annuity suitability training courses.



The screenshot shows a dialog box titled "Product Training & CE Options" with the RegEd logo and IRI icon. It contains a question: "Do you want to receive CE credit(s), where available, with your Product Training completion(s)?" with two radio button options: "I want to receive CE credit(s) with my Product Training completion(s)" (selected) and "I DO NOT want to receive CE credit(s) with my Product Training completion(s)". Below the options is a red warning message: "Warning! Ordering CE after the course is completed is NOT allowed for most states." At the bottom are "Proceed" and "Cancel" buttons.

Select whether you want to order CE with your course and then select **Proceed**.

The next page displays state specific CE information. Review the information, scroll to the bottom and select **Proceed**.

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Trax

Verify Information

Please verify your order below.

When you have verified your order and information, select the **Complete Your Order** button below.

Item	Credits	Item Price	Remove Item
NAIC Suitability in Annuity Transactions Model Regulation (390)		\$0.00	Remove
<i>Annuities State Suitability Approved In: AL, LA</i>			
Producer CE Credit for Louisiana	4.0 Annuities ClearCert Annuities Approved	\$0.00	Remove
CE Credit for Alabama Alabama State Fee	4.0 General ClearCert Annuities Approved	\$0.00 0.00	Remove
		Grand Total:	\$0.00

* Denotes required field

Provide State Required Information

The following information is required to properly process the Insurance CE credits that you are ordering.

* Social Security Number: ***-**-1111

* National Producer Number(NPN): 01010101

 License Type:

* Louisiana License Number: Producer [License Lookup](#)

* Alabama License Number: Producer [License Lookup](#)

Report completions to ClearCert

Provide Email and Delivery Address

Note: Email Address and Delivery Address is per your Profile Address

* Email Address: john.smith@reged.com

Delivery Address: 2100 Gateway Blvd
Morrisville NC 27560
United States

Submit Your Order
 Cancel Your Order

CE credit will be ordered with the appropriate Annuity course for each state the user has entered on the Producer Page through **Manage My State Suitability Requirements**. Review and confirm the information on the page, then select **Submit Your Order**. The user is then required to enter credit card information to pay any applicable fees. The user can then complete the course order by selecting **Submit Your Order** on the bottom of the page. The user is returned to the My Courses page and the new course is available to begin via the **Go To Course** link.

6.0 OPTIONAL INSURANCE CE

The optional insurance CE catalog allows the user access to RegEd’s insurance course catalog. The user is able to order insurance courses and CE in various states. RegEd rosters the CE completion to the state(s) automatically once the course is complete. Upon selecting the Optional Insurance CE menu item, the user is taken to the My Courses page, showing any ordered courses or courses already in progress.

- + Click **Select New Courses and CE Credit** button to begin.

- + Select the radio button for **“I want to receive Insurance and/or Professional Designation CE Credits”** to choose a course that offers continuing education credits.

- + Select a state for CE credit from the dropdown option that appears. Multiple states can be chosen by selecting additional states from subsequent dropdown lists.
- + Select a specific type of CE credit (annuity, ethics, long term care, etc.) as a filter to only display courses that satisfy this credit type. The list of credit types is only available after selecting a state from the drop down as each state may have approved different RegEd courses for different types of CE credit. The user may select any combination of checkboxes.

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Select Your License >> Choose Courses / CE Place Your Order

Insurance and/or Professional Designation CE Options

Do you want to receive Insurance and/or Professional Designation CE Credits?

I want to receive Insurance and/or Professional Designation CE Credits
 I DO NOT want to receive Insurance and/or Professional Designation CE Credits

Order Instructions: To order insurance and/or professional designation CE credit, choose the state(s) and/or professional designation(s) below. To receive state specific product Training and/or Long Term Care/Partnership Training credits, choose the appropriate state(s) and look for the courses that meet these requirements in the Notes section. After making all of your selection, select **Proceed**.

State Selections:

Alabama ▼ ✖ [\(Requirements\)](#)

Select State ▼

<input checked="" type="checkbox"/> Annuity (28)	<input type="checkbox"/> Bridge (2)	<input type="checkbox"/> Ethics (22)
<input type="checkbox"/> Flood (10)	<input type="checkbox"/> Life and Health (113)	<input type="checkbox"/> Long Term Care and Partnership (6)
<input type="checkbox"/> Property and Casualty (75)	<input type="checkbox"/> Any (205)	

Select your Professional Designations:

CFP
 CPCU
 CPE
 IMCA(CIMA/CIMC/CPWA)
 PACE

Warning! Ordering CE after the course is completed is NOT allowed for most states.

If a State or Professional Designation is selected, at least ONE inclusion per State / Professional Designation is required to proceed. Select ANY to see all courses offered for the selected States(s) / Professional Designation(s).

Proceed
 Cancel

- + Select any applicable professional designations for CE credit using the checkbox.
- + Select **Proceed** to view a list of available courses.

Review the list of available courses. The list of courses is sorted by the type of CE each course offers. Any courses that satisfy all of the pre-selected CE types are listed first, then the list is broken down by the CE type each available course offers.

If multiple states are selected, the results will list courses that satisfy CE requirements in all chosen states first. The results display a header in purple at the top of each section indicating what state and CE type the courses in the section satisfy.

Available Courses and CE Credit

To receive credit you must select **Add** for the credits desired. If no credits appear, the courses you have completed or ordered are not approved for that state or professional designation. To review your completed order, select **Proceed**.

Search Titles Within List

Your Top Matches:
 >> [AL: Ethics + AR: Ethics](#)
 >> [AR: Ethics](#)
 >> [AL: Ethics](#)

Please select a course approved in the category for which you seek credit. Ex. Ethics, Flood, General, L&H, P&C, Other. [Bottom](#)

Add Course	Credits	Course Rating	Price
Add State or Professional Designation CE			
AL: Ethics + AR: Ethics (16)			
<input type="checkbox"/> A Walk through the Ethical Insurance Practice (302)			\$0.00
<input type="checkbox"/> Producer CE Credit for Arkansas <i>Arkansas State Fee</i>	3.0 Ethics		\$0.00
<input type="checkbox"/> CE Credit for Alabama <i>Alabama State Fee</i>	3.0 Ethics		\$0.00
<input type="checkbox"/> Advanced Concepts in Anti-Money Laundering Compliance (eLIACA)			\$0.00
<input type="checkbox"/> Producer CE Credit for Arkansas <i>Arkansas State Fee</i>	3.0 Hours		\$0.00
<input type="checkbox"/> CE Credit for Alabama <i>Alabama State Fee</i>	3.0 Ethics		\$0.00
<input type="checkbox"/> DOL Fiduciary Standard in Retirement Accounts (475)			\$0.00
<input type="checkbox"/> Producer CE Credit for Arkansas <i>Arkansas State Fee</i>	3.0 Ethics		\$0.00
<input type="checkbox"/> CE Credit for Alabama <i>Alabama State Fee</i>	3.0 Ethics		\$0.00
<input type="checkbox"/> ETHICS: DO NO HARM (20W)			\$0.00
<input type="checkbox"/> Producer CE Credit for Arkansas <i>Arkansas State Fee</i>	4.0 Ethics		\$0.00
<input type="checkbox"/> CE Credit for Alabama	4.0 Ethics		\$0.00

- + Select the checkbox next to each course needed. The CE Credit box for each will be automatically selected to order CE for the course. The list shows the cost of the course (if applicable), the cost of the CE certification (if applicable) and the state fees (if applicable).
- + Select **Manage My Selection** to modify the search criteria and search again.
- + Scroll to the bottom and Select **Proceed** after choosing all desired courses to continue to a page detailing the specific state requirements for CE.

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Select Your License | Choose Courses / CE | Place Your Order >

State, Professional Designation and Product Training Requirements

STOP! Important CE Information. Action May Be Required. Please Read.

The following is a list of testing requirements for the states and professional designations that you selected. Read these testing requirements carefully as non-compliance may delay or prevent your receipt of a certificate of completion.

[Alabama](#) | [Arkansas](#)

After reading all of the information below, select the **Proceed** button at the bottom of the screen. [Bottom](#)

Alabama:	http://www.aldoi.gov State Insurance CE Requirements Department of Insurance 201 Monroe St. Suite 502 Montgomery, AL 36104 phone (334) 269-3550 fax (334) 240-3282 Insdept@insurance.alabama.gov
Format:	Internet Approved.
State Fees:	Examination must be a closed book exam and must remain sealed and/or must not be viewed until examinee is in the presence of the proctor. \$1.00 per course credit hour.
Proctor:	The proctor must be a disinterested third party, with a minimum age of 18 years, who can be any person except for family members or individuals who have a financial interest in the success of the student taking the examination. Co-worker proctors must not be above or below in the students line of supervision.
Affidavit:	The examinee and monitor/proctor must complete the electronic affidavit form online upon entry of the examination section and certify the information and procedures upon completion of the exam.
Processing:	You may retrieve your certificate at www.reged.com/Certificates . Retain your certificates for your records and for your license renewal process. In addition, we will notify the state of your successful completion. This state notification process occurs each business day.
Notes:	Please Note: Time of course completion is recorded under Eastern Standard Time. IMPORTANT CE NOTICE: The completion date that appears on your certificate of completion and course credit reporting roster will be the date that all state requirements are met. The requirements include: CE order, successful exam completion, and submission of a monitor/proctor affidavit. Approvals for insurance CE are subject to change. Before completing your course, please ensure that the credits for which the course is approved have not changed. Users must select to receive insurance CE credit at the time of course order. Upon entry of the examination, the examinee will have 24 hours to complete the examination. After the 24 hour period, you will have to restart the examination process.

To view your **Long Term Care Product Training requirements** by state, click [HERE](#).

- + Read the state information carefully to ensure compliance with each state's rules and regulations regarding CE completion. If multiple states were selected, the page details information for each state's requirements.
- + Select **Proceed** at the bottom of the page.

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Trax

1 Select Your License 2 Choose Courses / CE 3 Place Your Order >>

Verify Information

Please verify your order below. To add more courses or credits, select the **Add More Courses and CE Credits** button below.

When you have verified your order and information, select the **Submit Your Order** button below.

+ Add More Courses and CE Credits

Item	Credits	Course Rating	Item Price	Remove Item
A Walk through the Ethical Insurance Practice (302) +			\$0.00	Remove
CE Credit for Alabama <i>Alabama State Fee</i>	3.0 Ethics		\$0.00	Remove
Producer CE Credit for Arkansas <i>Arkansas State Fee</i>	3.0 Ethics		\$0.00	Remove
DOL Fiduciary Standard in Retirement Accounts (475) +			\$0.00	Remove
CE Credit for Alabama <i>Alabama State Fee</i>	3.0 Ethics		\$0.00	Remove
Producer CE Credit for Arkansas <i>Arkansas State Fee</i>	3.0 Ethics		\$0.00	Remove
			Grand Total:	\$0.00

* Denotes required field

Provide State Required Information

The following information is required to properly process the Insurance CE credits that you are ordering.

* Social Security Number: - -

* National Producer Number(NPN): [Find NPN](#)

License Type:

* Alabama License Number: Producer [License Lookup](#)

* Arkansas License Number: Producer [License Lookup](#)

Provide Email and Delivery Address

Note: Email Address and Delivery Address is per your Profile Address

* Email Address:

* Address 1:

- + Enter personal information required to complete the CE order then select **Submit Your Order** at the bottom of the page.
- + A credit card payment screen will appear next. Enter valid credit card information and select **Submit Your Order** at the bottom of the page to complete your course CE order. The user will then move back to the **My Courses** page with the new insurance course(s) available to begin.
- + RegEd rosters the CE to the appropriate state upon completion of each course where CE credit was ordered.

7.0 MY CERTIFICATES

The My Certificates page lists any completed CE, the date completed and a link to download the certificate of completion.

8.0 MY ACCOUNT

The My Account page allows the user to update personal information saved in RegEd, such as login security questions, national producer number, business address and home address. This page also displays order history and allows the user to view receipts from past orders.

9.0 ADMINISTRATIVE FEATURES

9.1 Producer Lookup

Administrative users are able to look up an individual producer by a combination of name and national producer number or name and social security number. Administrators are able to lookup producers that have accessed or completed their firm's product training.

Producer Status

Please enter the producer's identification information

First Name

Last Name

National Producer Number

Social Security Number - -

- + **Step 1:** Select **Producer Admin Status**.
- + **Step 2:** Enter the producer's **First Name**, **Last Name**, and **National Producer Number** or **Social Security Number**.
- + **Step 3:** Select **Search**.

Search Results

Action	First Name	Last Name	National Producer Number	Social Security Number
	John	Smith	1111111	XXX-XX-1111

- + **Step 4:** Select the magnifying glass to view training assignment and completion information for a producer.

Producer Status			
John Smith (XXX-XX-1111) As of: 1/1/2017 - 8:00 AM (EST)			
Annuities State Suitability Compliance Summary			
State	Resident?	Requirement Met?	Course Status
Ohio	Yes	Yes	Course Completed
State Suitability Completion History			
Course Title	Course Completion Date	Reciprocal States	
NAIC Suitability in Annuity Transactions Model Regulation (390)	06/20/2011	AK, CO, CT, DC, GA, HI, IA, ID, IL, IN, KS, KY, LA, MD, ME, MI, MN, MS, ND, NE, NH, NJ, OH, OK, OR, RI, SC, SD, TN, WA, WI, WV, WY	
Carrier-Specific Product Training			
Requirement	Completion Date	Requirement Status	
ACME Annuity Product Training			
ACME - Product Training Alpha (ACME_01)		Not Complete	
ACME - Product Training Beta (ACME_02)		Not Complete	
ACME - Product Training Gamma (ACME_03)		Not Complete	

The producer's completion data shows for their resident and non-resident licensed states, state suitability training completion and carrier-specific product training.

9.2 Reports

Administrative users are also able to run reports to view assignments and completions for the firm's product training courses and gather information about the producers taking their courses.

The Reporting home page organizes available reports into sections for each RegEd application. Click on a header to view the available reports for each application.

+ Carrier Specific Product Training Status

This report displays the status of individuals' assigned product training courses.

This report includes the following fields: Name | Producer Email | Producer NPN | Producer SSN | Requirement Name | Requirement | Date Requirement Assigned | Date Complete

+ Producer Information

This report displays user profile information in RegEd.

This report includes the following fields: Prefix | Name | Middle Initial | Suffix | Producer's SSN | Producer's NPN | Business Email | Business Address 1 | Business Address 2 | Business City | Business State | Business Zip | Business Phone | Business Fax

+ Producer Training Requirements Not Ordered

This report displays users with assigned courses that have not yet been ordered (accessed) by the user.

This report includes the following fields: Name | Producer Email | Producer NPN | Producer SSN | Requirement Name | Requirement | Date Assigned | Date Complete

+ **Producer Training Requirements Ordered**

This report displays users with an assigned course(s) that have accessed the course(s). This will include users that have completed or partially completed the course.

This report includes the following fields: Name | Producer Email | Producer NPN | Producer SSN | Requirement Name | Requirement | Requirement Date Assigned | Ordered Date | Date Complete

+ **State Suitability Training Completions**

This report displays completion information for users that have taken a state suitability course.

This report includes the following fields: Name | Producer's Email Address | Producer's NPN | Producer's SSN | Course Title | Course ID | Date Course Completed | State Insurance Credit Requested | Status of CE Credit

Please let us know if you have feedback on how to make this guide more useful.

For any additional questions, comments or requests for changes and enhancements, please contact your RegEd Account Manager.