Guide to Accessing Lincoln Fixed and Variable Annuity Training

LIMRA Training Site

You're In Charge[SM]

Producer Training Requirement for Fixed and Variable Individual Annuities

- The NAIC Suitability Model Regulation requires producers to complete four hours of general annuity training and ongoing product-specific training prior to submitting business .
- Lincoln has chosen LIMRA as the vendor to provide Lincoln's product-specific training for most distribution partners in accordance with the NAIC Annuity Suitability Model Regulation.
- Producers have the option to complete the general training on the site or upload a certificate of completion from another CE vendor
- The following pages provide information on accessing Lincoln's Annuity Training.   To access LIMRA's training site go to:

http://naic.pinpointglobal.com/LincolnFinancial/Apps/default.aspx

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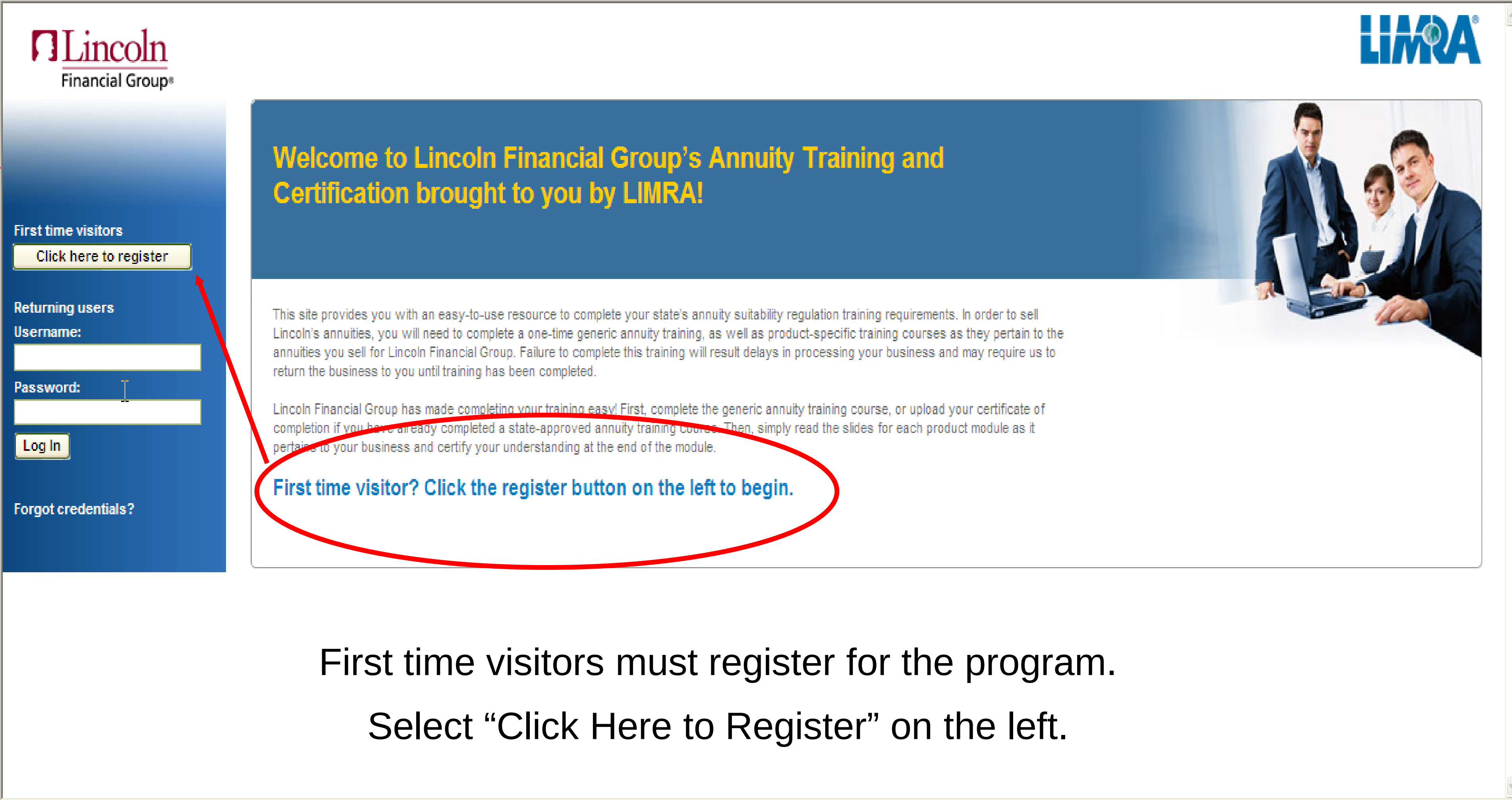

First time visitors must register for the program.

Select "Click Here to Register" on the left.

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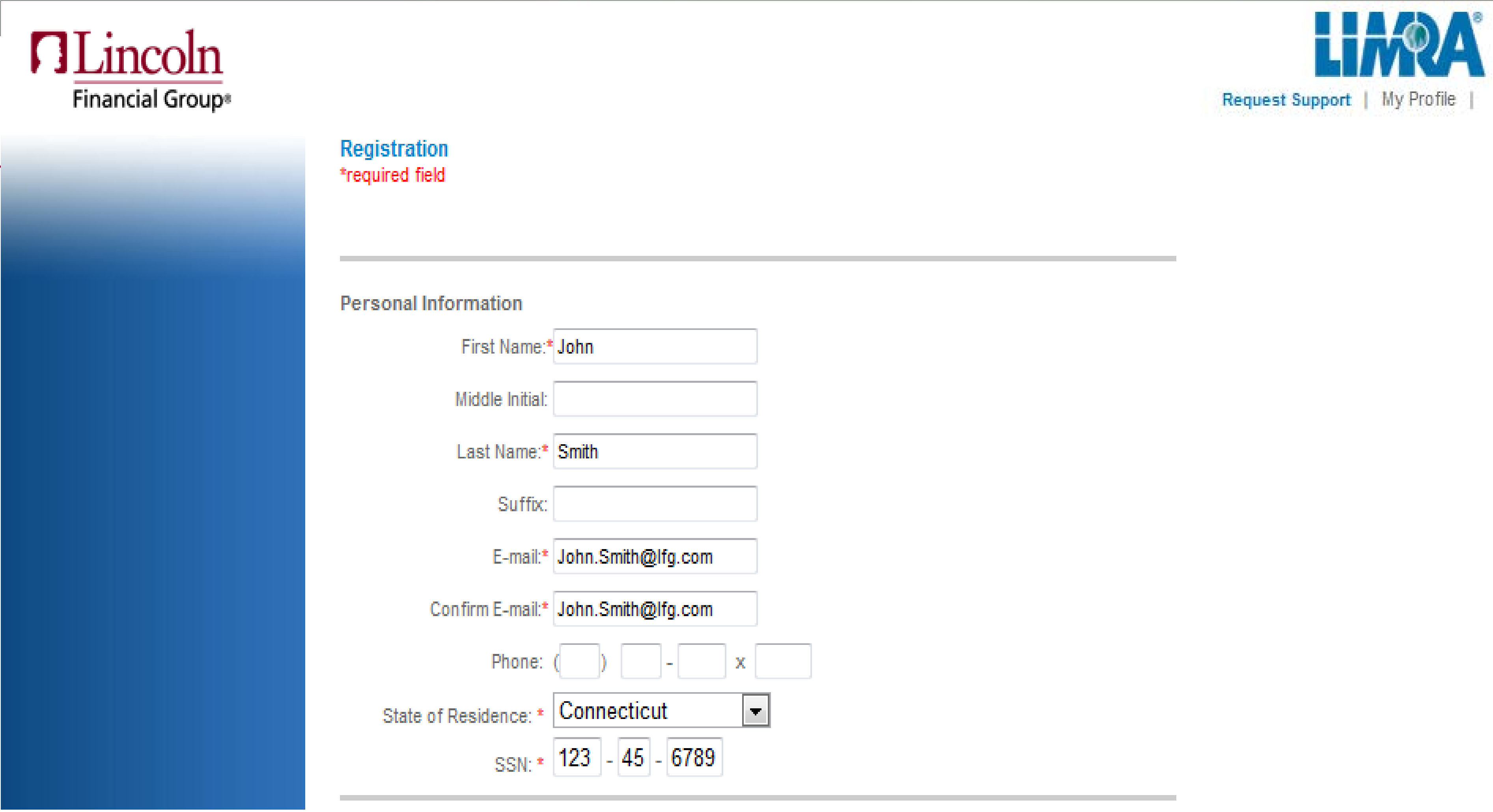
Lincoln Financial Group
Request Support | My Profile |

Registration
*required field

Personal Information

First Name:* John
Middle Initial:
Last Name:* Smith
Suffix:
E-mail:* John.Smith@lfg.com
Confirm E-mail:* John.Smith@lfg.com
Phone: ( ) - x
State of Residence: * Connecticut
SSN: * 123 - 45 - 6789

You will be prompted to fill out information including your first name, last name, e-mail address, resident state, and SSN.

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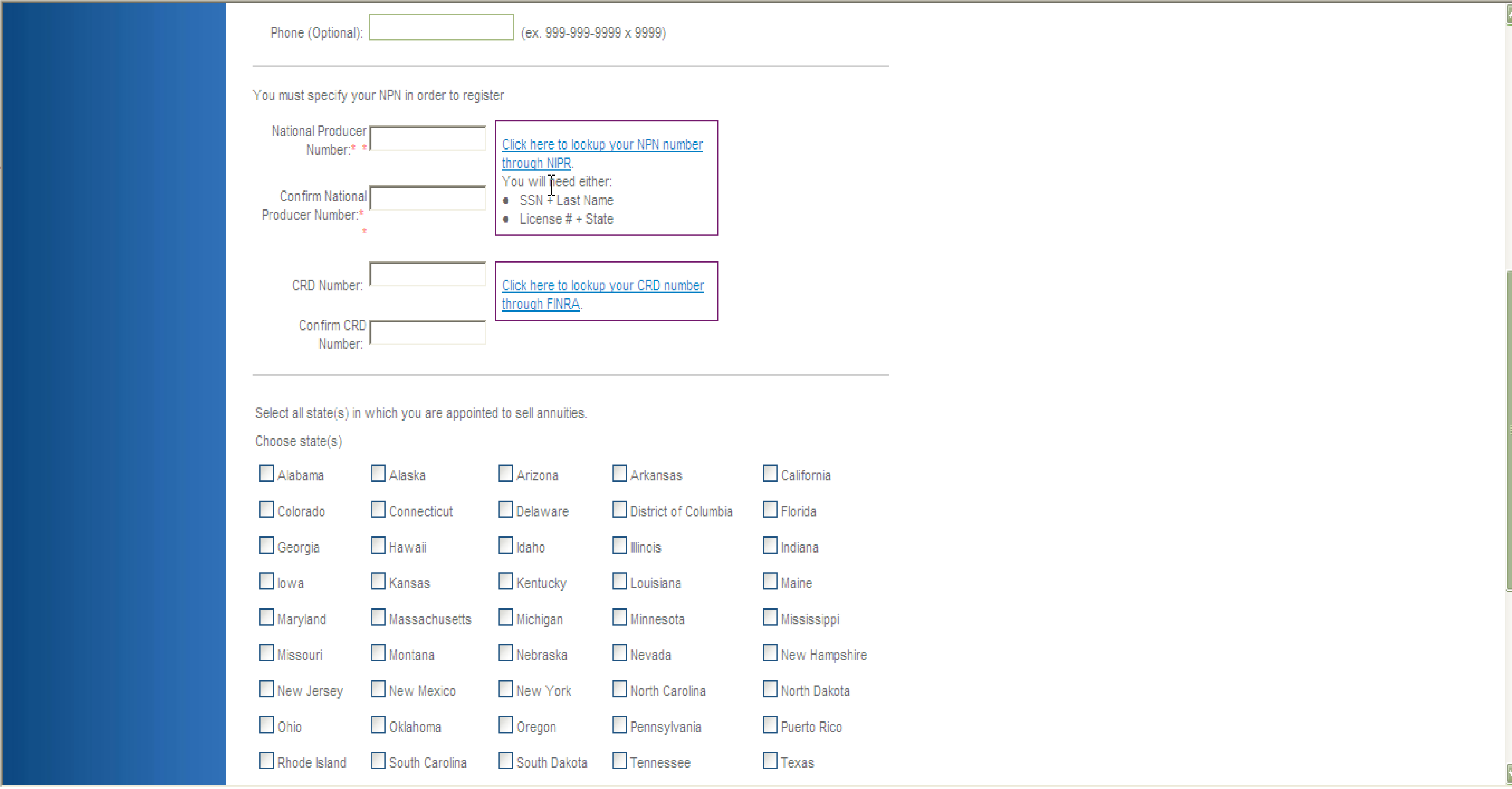
Phone (Optional): (ex. 999-999-9999 x 9999)

You must specify your NPN in order to register

National Producer Number:* *

Click here to lookup your NPN number through NIPR.
You will need either:
- SSN + Last Name
- License # + State

Confirm National Producer Number:* *

CRD Number:

Click here to lookup your CRD number through FINRA.

Confirm CRD Number:

Select all state(s) in which you are appointed to sell annuities.

Choose state(s)

Alabama	Alaska	Arizona	Arkansas	California
Colorado	Connecticut	Delaware	District of Columbia	Florida
Georgia	Hawaii	Idaho	Illinois	Indiana
Iowa	Kansas	Kentucky	Louisiana	Maine
Maryland	Massachusetts	Michigan	Minnesota	Mississippi
Missouri	Montana	Nebraska	Nevada	New Hampshire
New Jersey	New Mexico	New York	North Carolina	North Dakota
Ohio	Oklahoma	Oregon	Pennsylvania	Puerto Rico
Rhode Island	South Carolina	South Dakota	Tennessee	Texas

Scroll down the page to select the state(s) in which you are licensed to sell annuities. You may also include your CRD number if you are appointed to sell Lincoln's variable annuities

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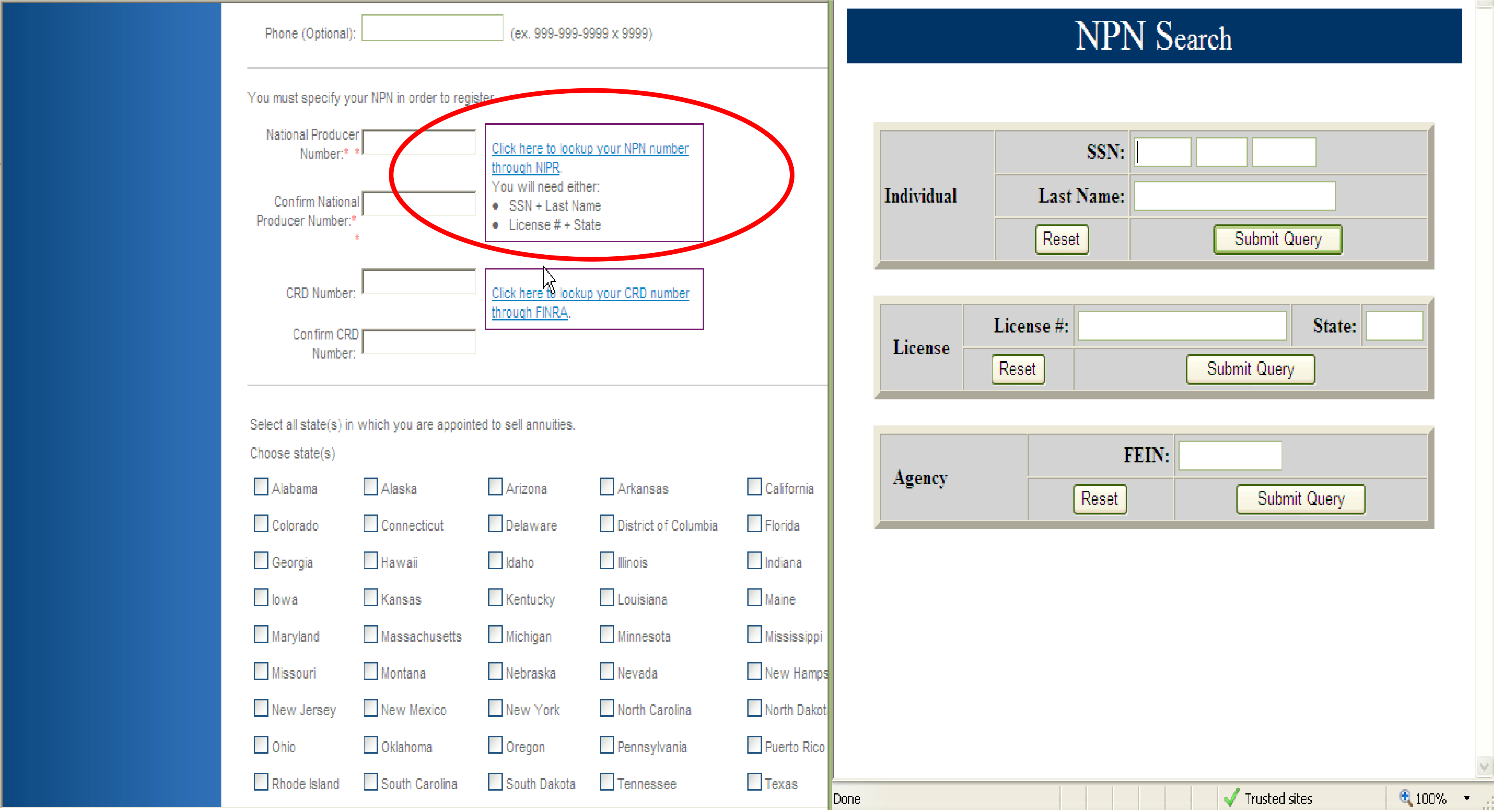

If you do not know your NPN Number, select “Click here to lookup your NPN number through NIPR.” You will need your SSN/Last Name or your License #/State or your agency FEIN to search for your NPN number.

The site will automatically populate the NPN number box.

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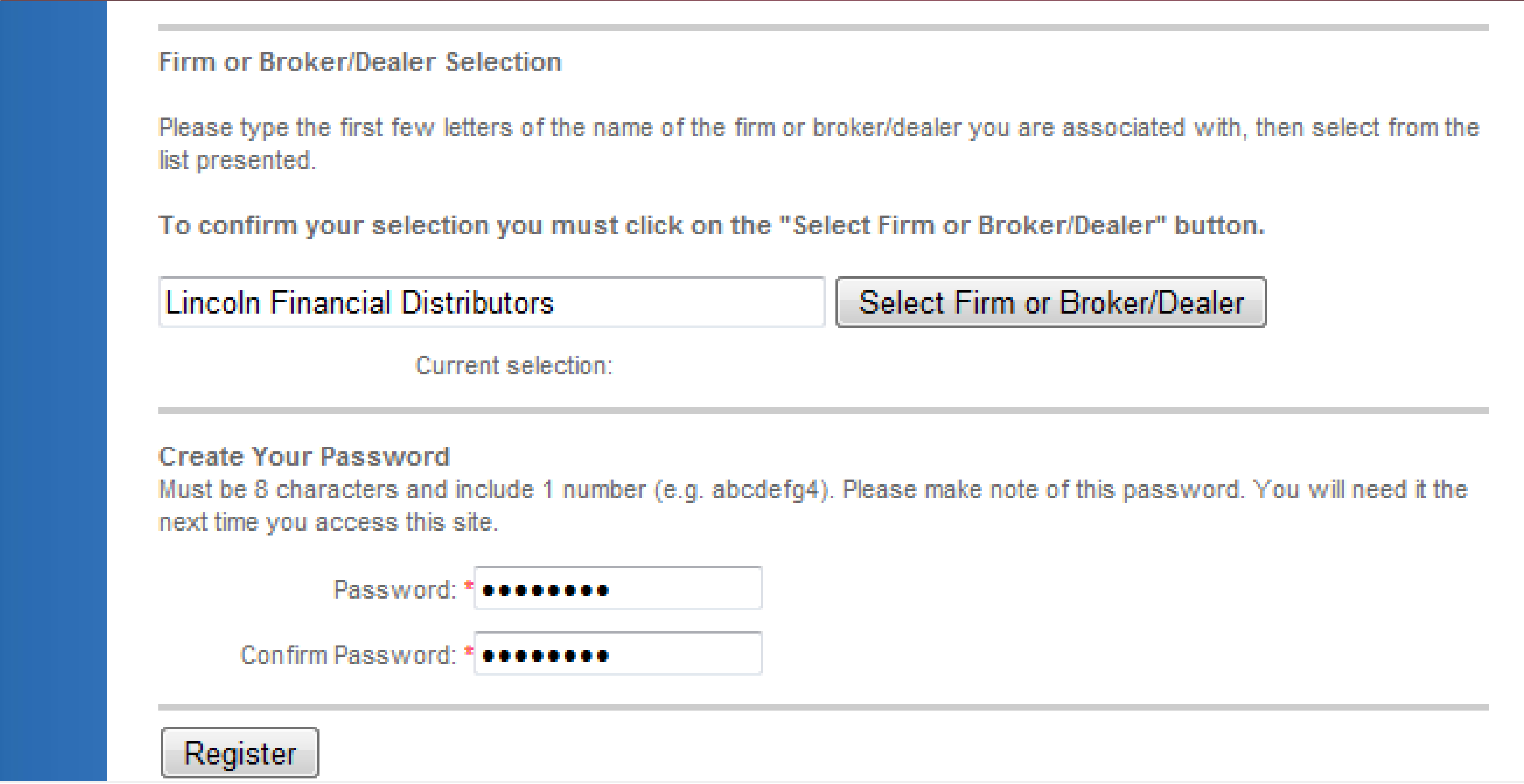

At the end of the page, select a firm or broker/dealer and a password to use and click "Register." If you are not affiliated with a broker/dealer or your broker/dealer is not found, please select "OTHER".

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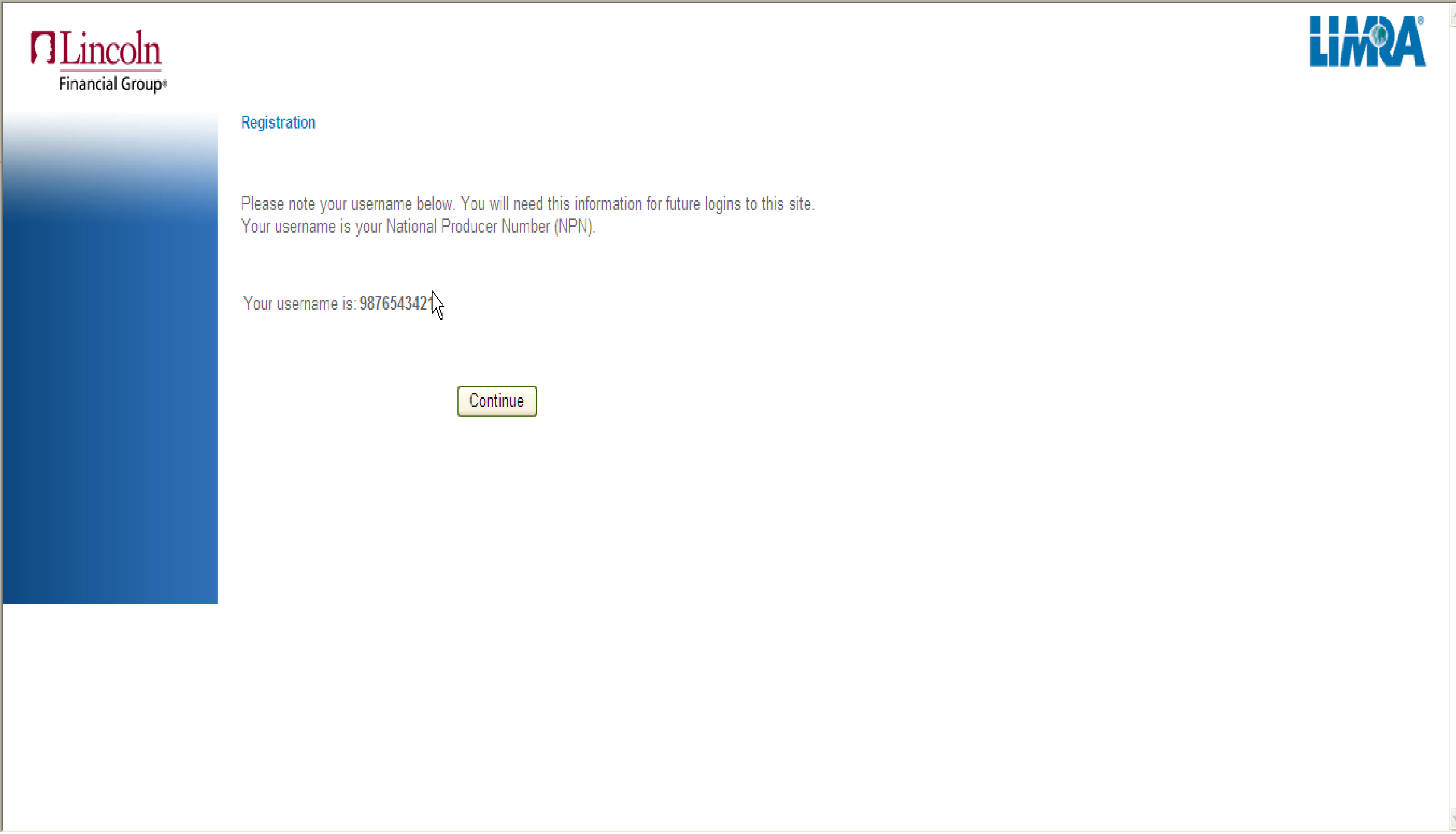

The system will assign a username for you to use along with your password to log onto the site in the future.

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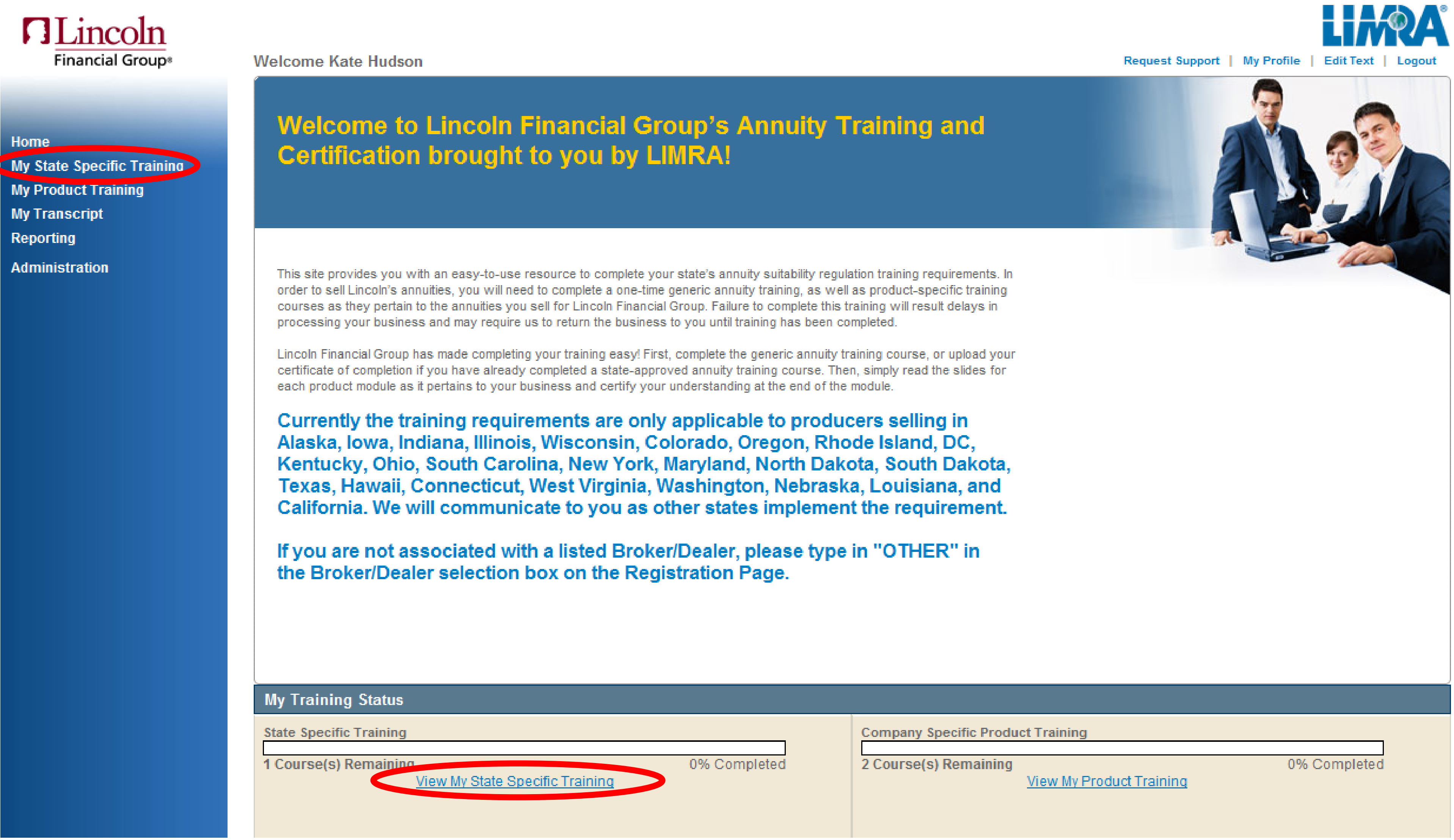

The first page after you log in contains a summary of your state and product training requirements. From this page click on "My State Specific Training" on the left menu or on "View My State Specific Training" towards the bottom of the page in the My Training Status section.

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Welcome Kate Hudson

Request Support | My Profile | Edit Text | Logout

My State Specific Training

Your state's annuity suitability regulation mandates that producers take a one-time four hour general annuity training. This training will include information on the general nature of annuities, appropriate sales practices, and suitable recommendations.

If you have not completed your general education requirement for your selected states, please select from the course listed below

Refresh

Annuities and Suitability Explained – Connecticut

You must complete one of the items below to satisfy the regulation requirements for this state (either the National Underwriter course OR uploading a qualifying CE Certificate from a course you took previously)

National Underwriter State Specific Course (106-CT) (click to expand or collapse)

Date Completed

Annuities and Suitability Explained – Connecticut
Launch

Certificate Upload (106-CT) (click to expand or collapse)

Date Completed

Import Certificate of Completion - Connecticut
Launch

The My State Specific Training page contains the “National Underwriter CE Course” and allows you to take the course and exam or to upload a certificate of completion if you have already completed the training.

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Annuities and Suitability Explained – Connecticut

You must complete one of the items below to satisfy the regulation requirements for this state (either the National Underwriter course OR uploading a qualifying CE Certificate from a course you took previously)

☐ **National Underwriter State Specific Course (106-CT)** (click to expand or collapse)

Date Completed

☐ **Annuities and Suitability Explained – Connecticut**
Launch

☐ **Certificate Upload (106-CT)** (click to expand or collapse)

Date Completed

☐ **Import Certificate of Completion - Connecticut**
Launch

Lincoln is excited to announce that we now offer producers the ability to take their NAIC 4 hour general annuity training for **FREE** through Kaplan.

In order to access this service, click on the Kaplan link below that will transfer you to Kaplan's website. Once you are on the Kaplan website you must enter the Lincoln portal code: **LincolnFG** to receive the General Annuity training for free. Click on the Accessing Annuity Training Through Kaplan link for a walk-through for accessing the training.

Kaplan

Accessing Annuity Training Through Kaplan

If you have not completed your state annuity training, click "Launch" under "National Underwriter CE Course". A pop up will appear to take you to Kaplan to complete the state annuity training. Click on the underlined word "Kaplan" in the pop up.

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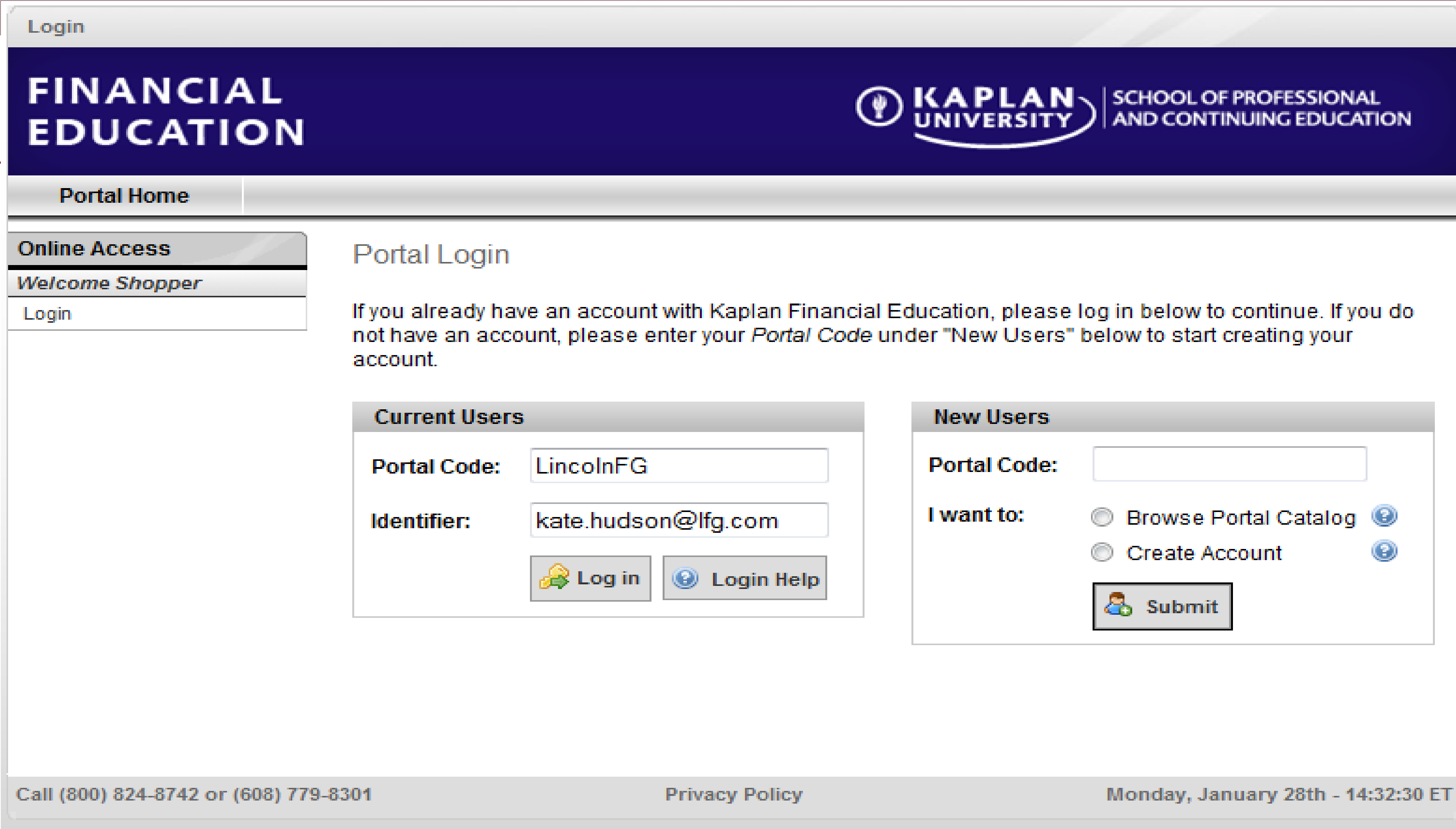

On the Kaplan log in page, enter LincolnFG for the portal code and the email address you provided LIMRA for the identifier.

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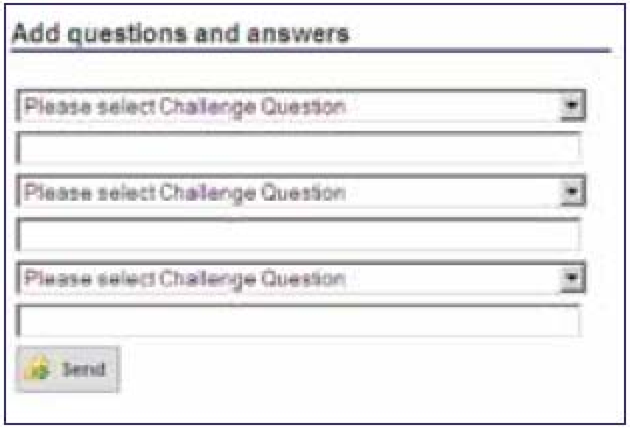

Upon your first time logging into the site, you will be prompted to select and answer three challenge questions.

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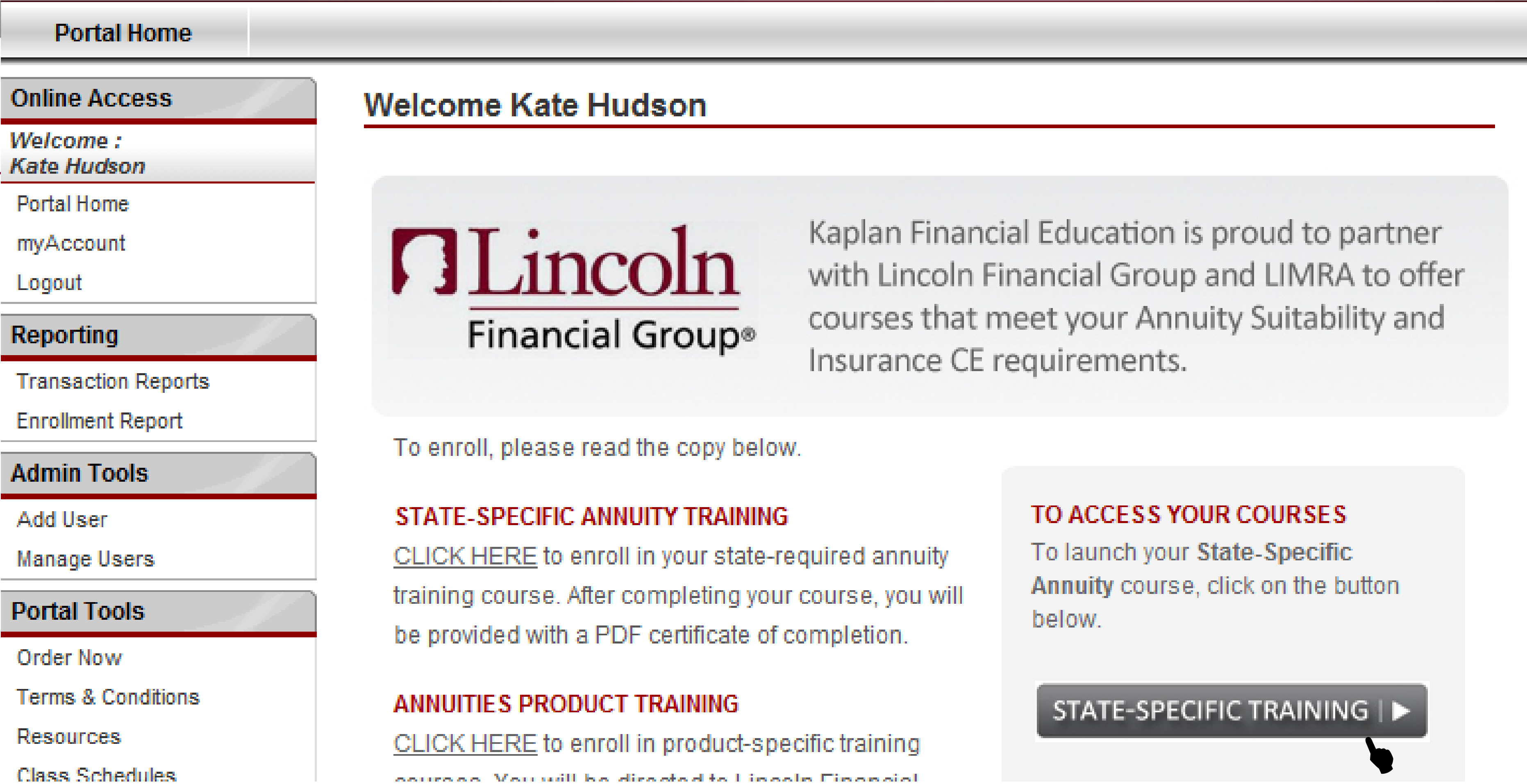

Click on the STATE-SPECIFIC TRAINING button.

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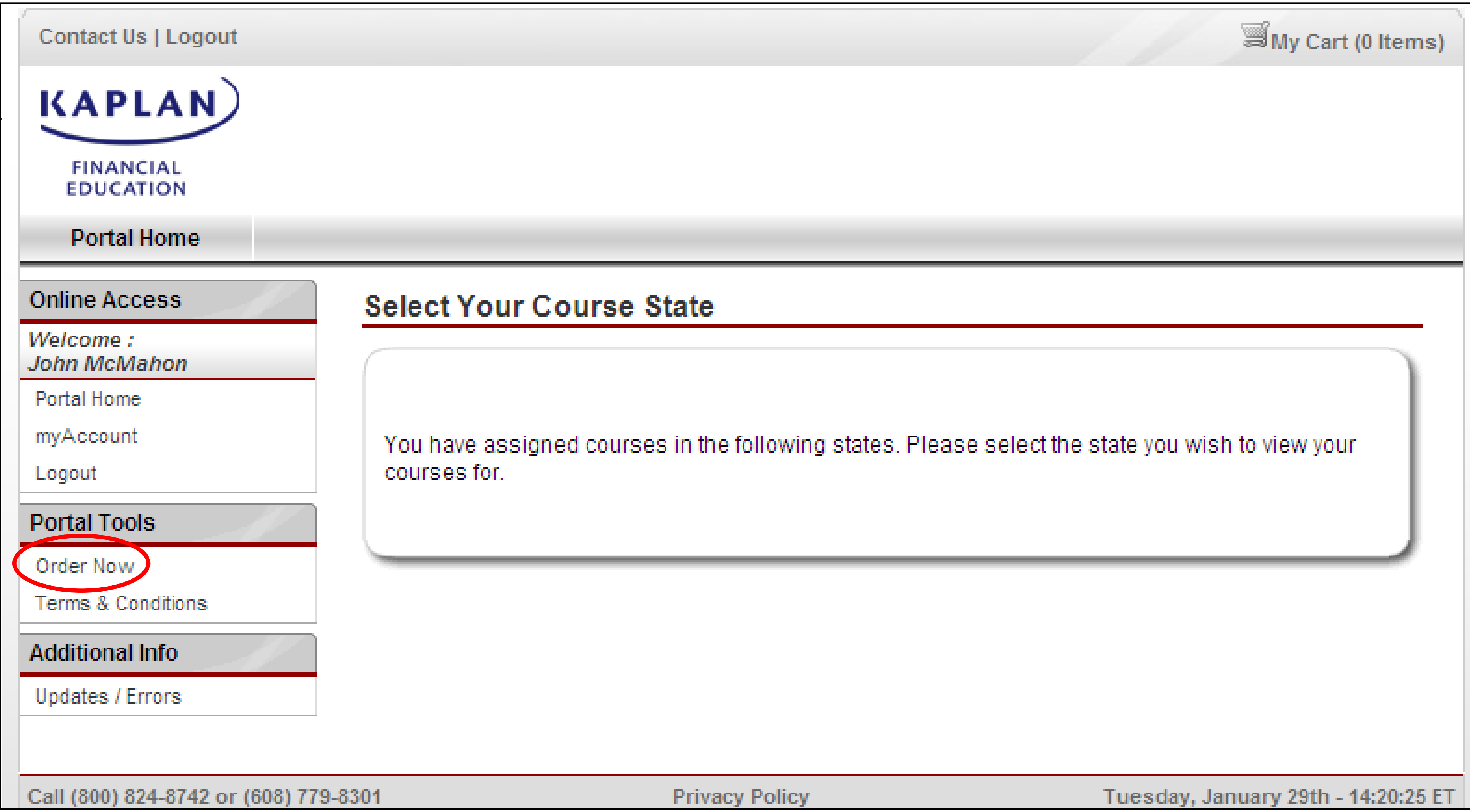
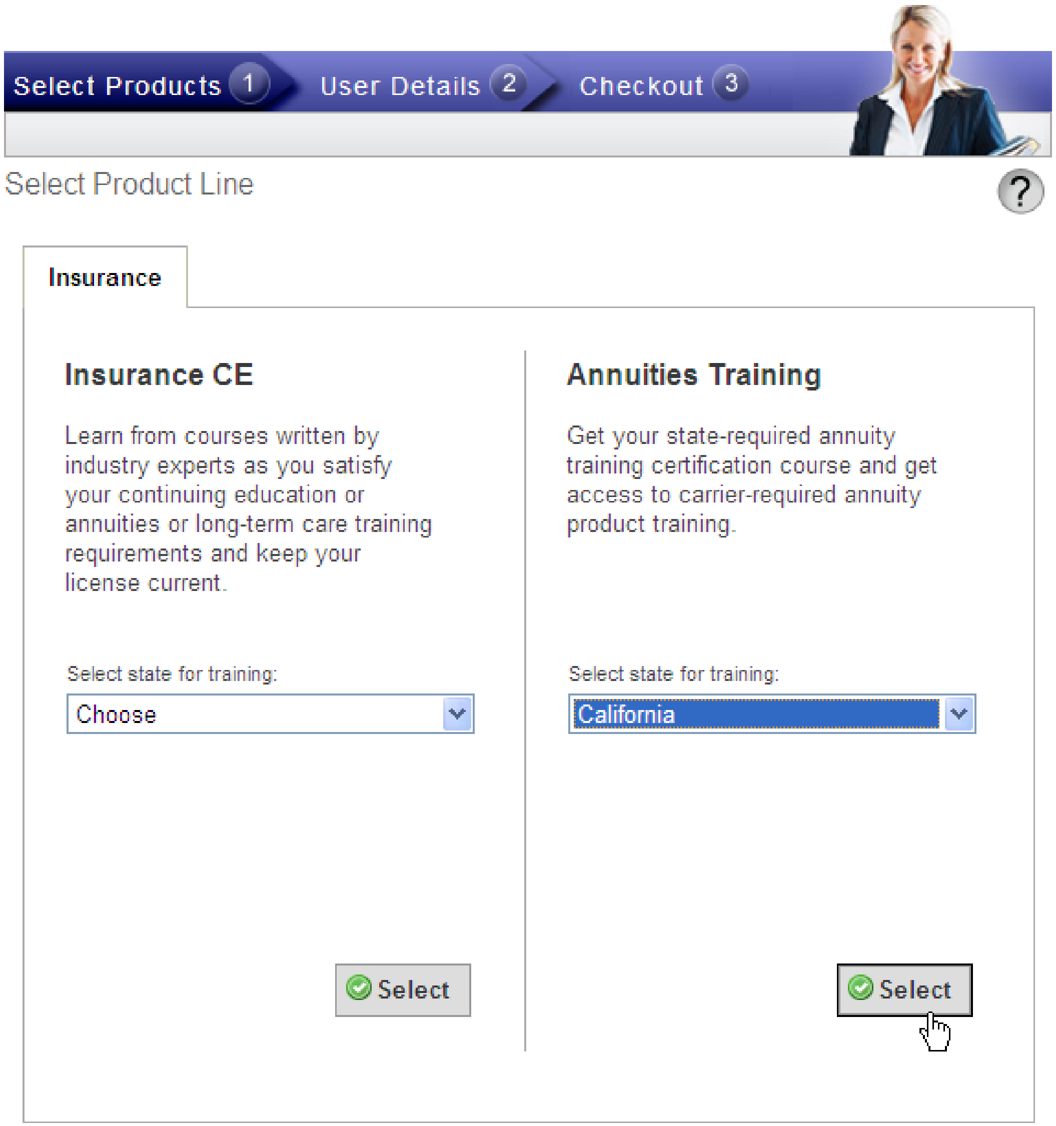


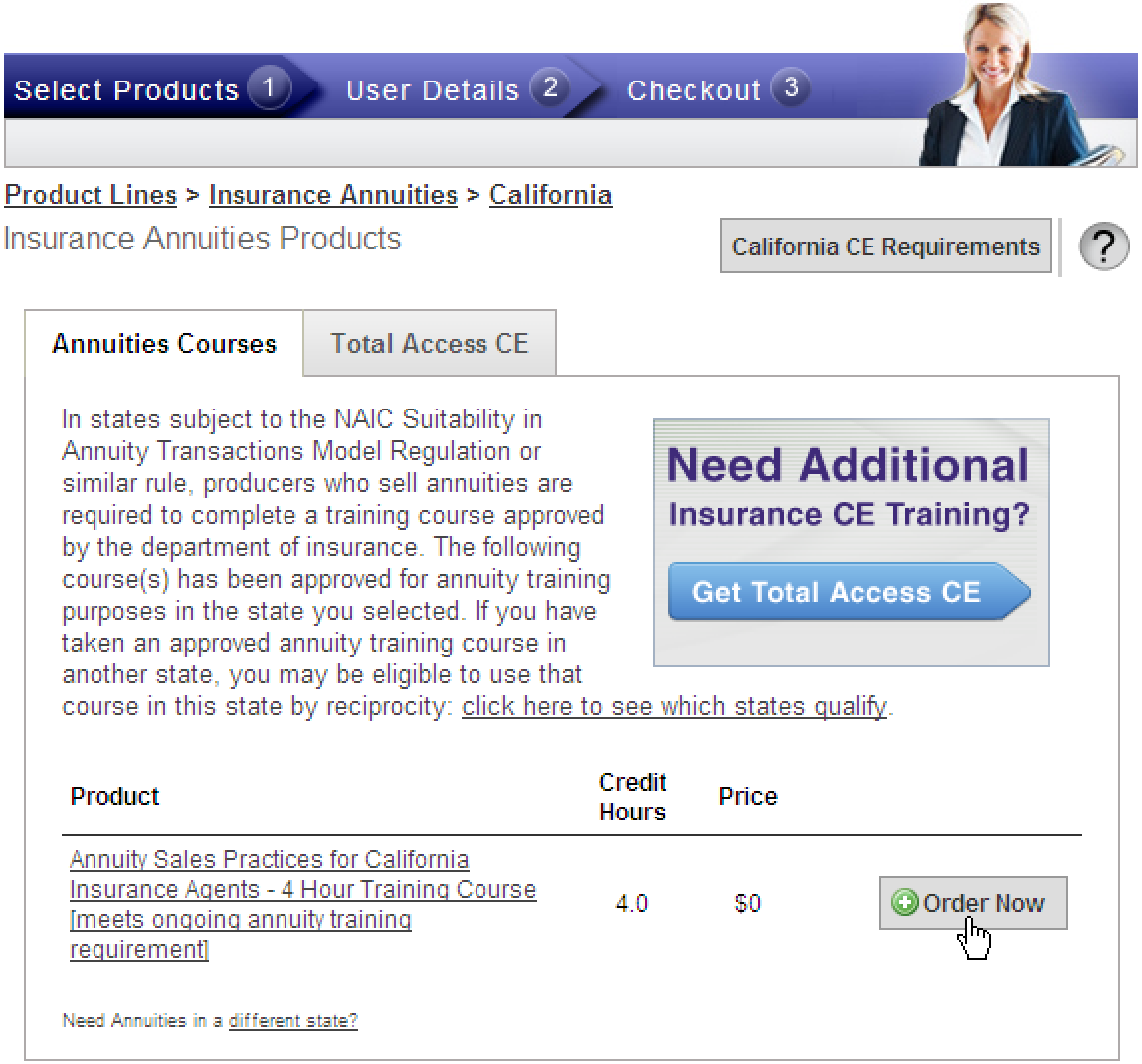
Click on “Order Now” to add General Annuity training to your list of training courses.

Compliance Number

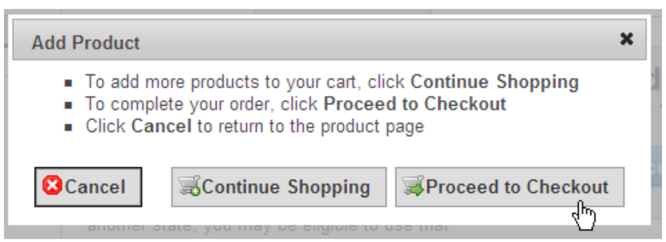


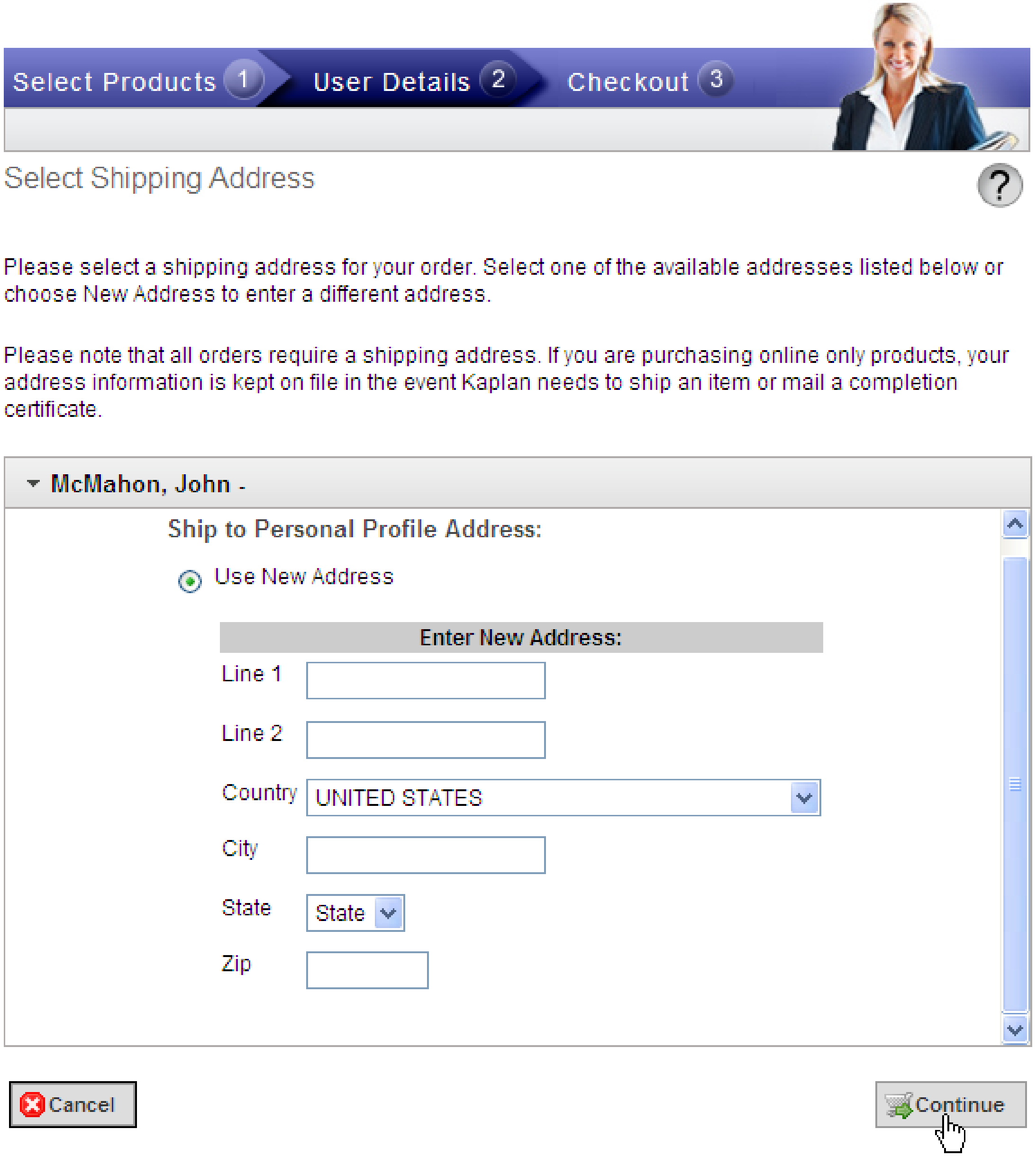
Click on the drop down menu and select the state(s) for the required General Annuity Training.

Then click the “select” box to proceed to the next page.



Review your selection and click the "Order Now" button to proceed to checkout. A pop up will appear, click the "Proceed to Checkout" box.





Select Products 1 User Details 2 Checkout 3

Select Shipping Address

Please select a shipping address for your order. Select one of the available addresses listed below or choose New Address to enter a different address.

Please note that all orders require a shipping address. If you are purchasing online only products, your address information is kept on file in the event Kaplan needs to ship an item or mail a completion certificate.

McMahon, John -

Ship to Personal Profile Address:

Use New Address

Enter New Address:

Line 1

Line 2

Country UNITED STATES

City

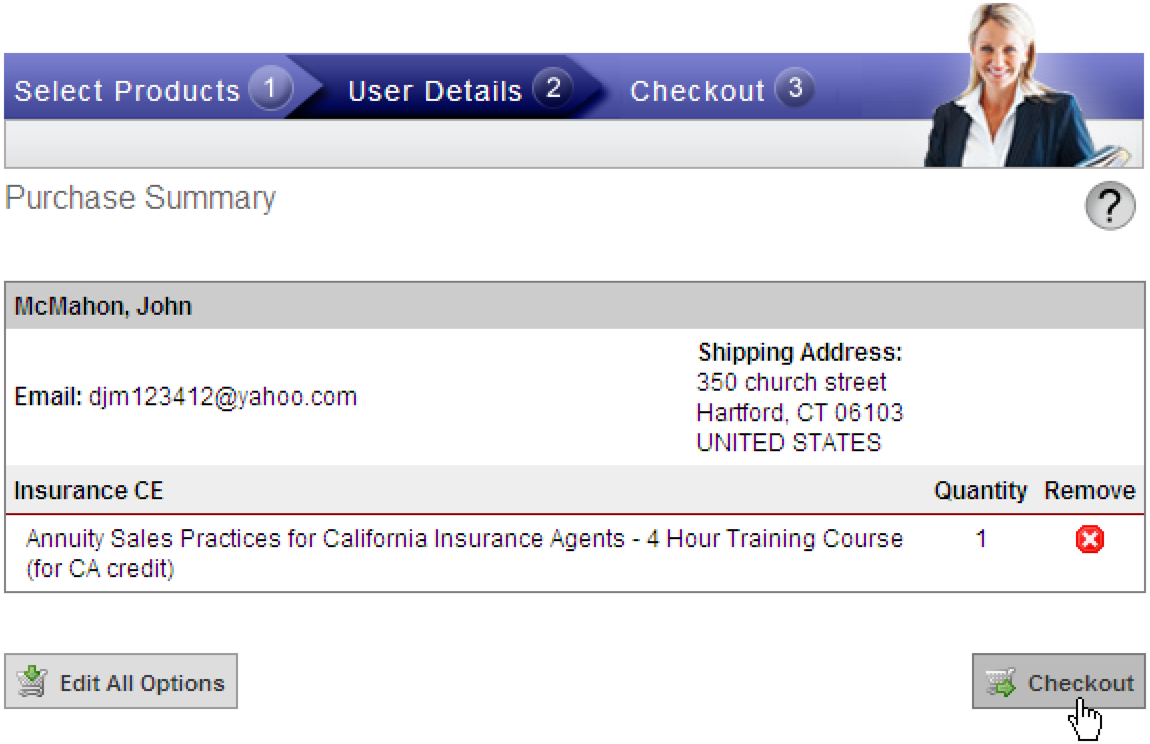
State State

Zip

Cancel

Continue

Confirm your mailing address to receive a hard copy of your Certificate of completion after completing your General Annuity Training. Then click "Continue"



Click "Checkout" to review and complete your order.

Select Products 1 User Details 2 Checkout 3

Order Complete

Confirmation Number: **668504**

Thank you for ordering our products. Please print this page for your records.

Billing Summary

	Products	Tax**	Shipping	Total
Order Total	$0	$0	$0	$0

** Tax shown is based on current rates. Rates are subject to change.

Order Summary

Order Detail...	McmJ3396588_2	Tax:**	$0	Shipping:	$0	Subtotal:	$0

Total Price: **$0**

Refund / Cancellation / Product Return Policy

See our website for product availability.

Place New Order

Portal Home

Lincoln Financial Group®

Kaplan Financial Education is proud to partner with Lincoln Financial Group and LIMRA to offer courses that meet your Annuity Suitability and Insurance CE requirements.

To enroll, please read the copy below.

STATE-SPECIFIC ANNUITY TRAINING

CLICK HERE to enroll in your state-required annuity training course. After completing your course, you will be provided with a PDF certificate of completion.

ANNUITIES PRODUCT TRAINING

CLICK HERE to enroll in product-specific training courses. You will be directed to Lincoln Financial Group's LIMRA portal.

INSURANCE CONTINUING EDUCATION

CLICK HERE to purchase Insurance Continuing Education (CE) courses that are approved in your state of residence. **You will receive a 20% discount**. Each course is written by industry experts and provides you with the skills necessary to meet mandatory requirements. After completing your course(s), you will be provided with a PDF certificate of completion.

TO ACCESS YOUR COURSES

To launch your **State-Specific Annuity** course, click on the button below.

STATE-SPECIFIC TRAINING

To launch Lincoln's **Product Training** through LIMRA, click on the button below.

PRODUCT TRAINING

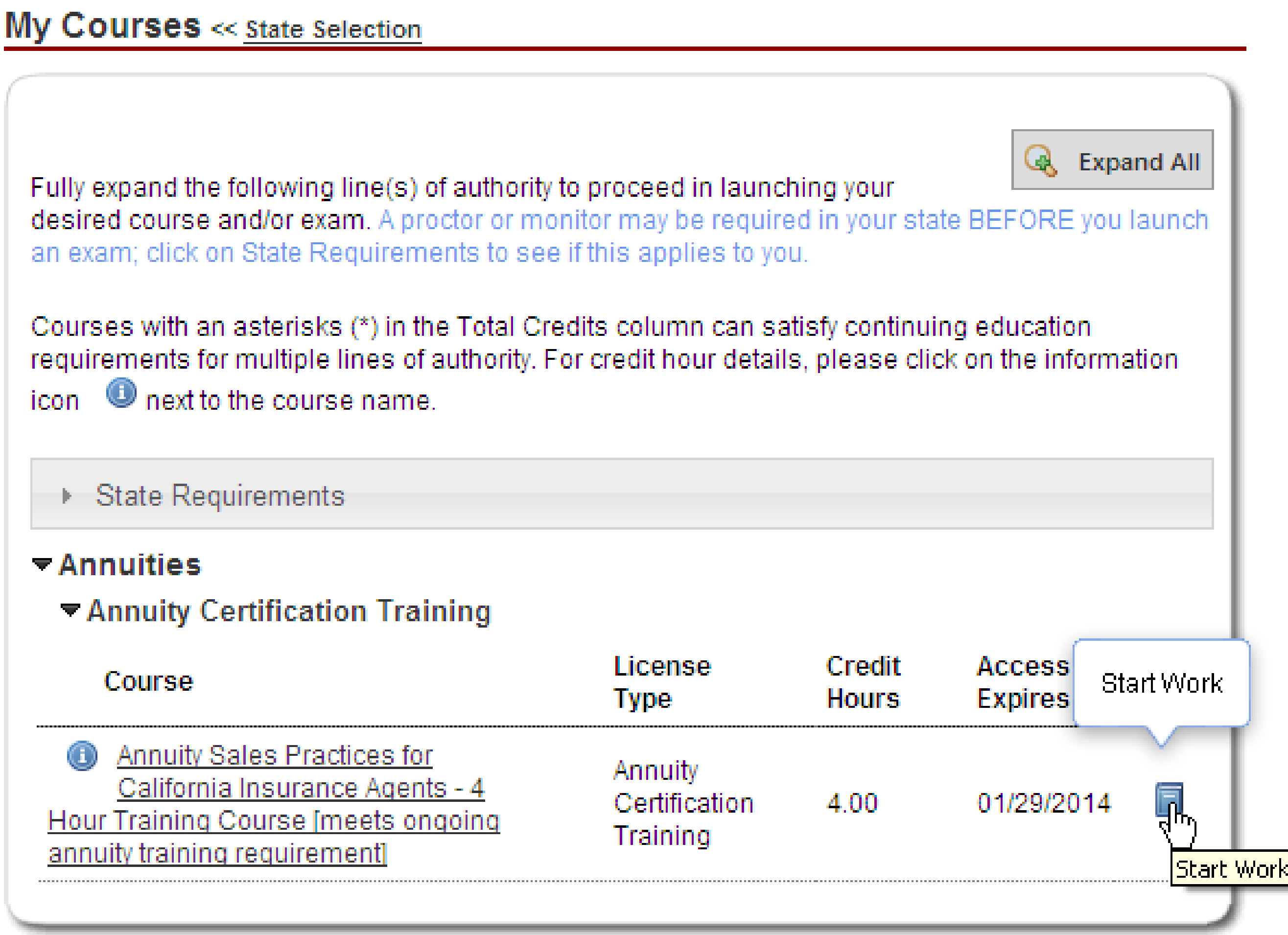
To launch **Insurance CE** courses, click on the button below.

INSURANCE CE

After receiving your confirmation, click "Portal Home".

After returning to the homepage, click the "State-Specific Training" box.

Compliance Number



Under "Annuities" click on "Start Work" to take your General Annuity Training.

Verify Account Information

McMahon, John:

Please take a moment to ensure your information is correct.

Completion of this course cannot be reported until all required information is correctly provided.

Required Identifiers

CA Insurance License Number

SSN Last 4

Social Security Number

Edit

Confirm Carriers for Completion Reporting

Click Here to Select All Carriers

- [x] Lincoln Financial
  SSN Required

- [ ] I do NOT want this course completion reported

Continue to Course

Remind Me Later

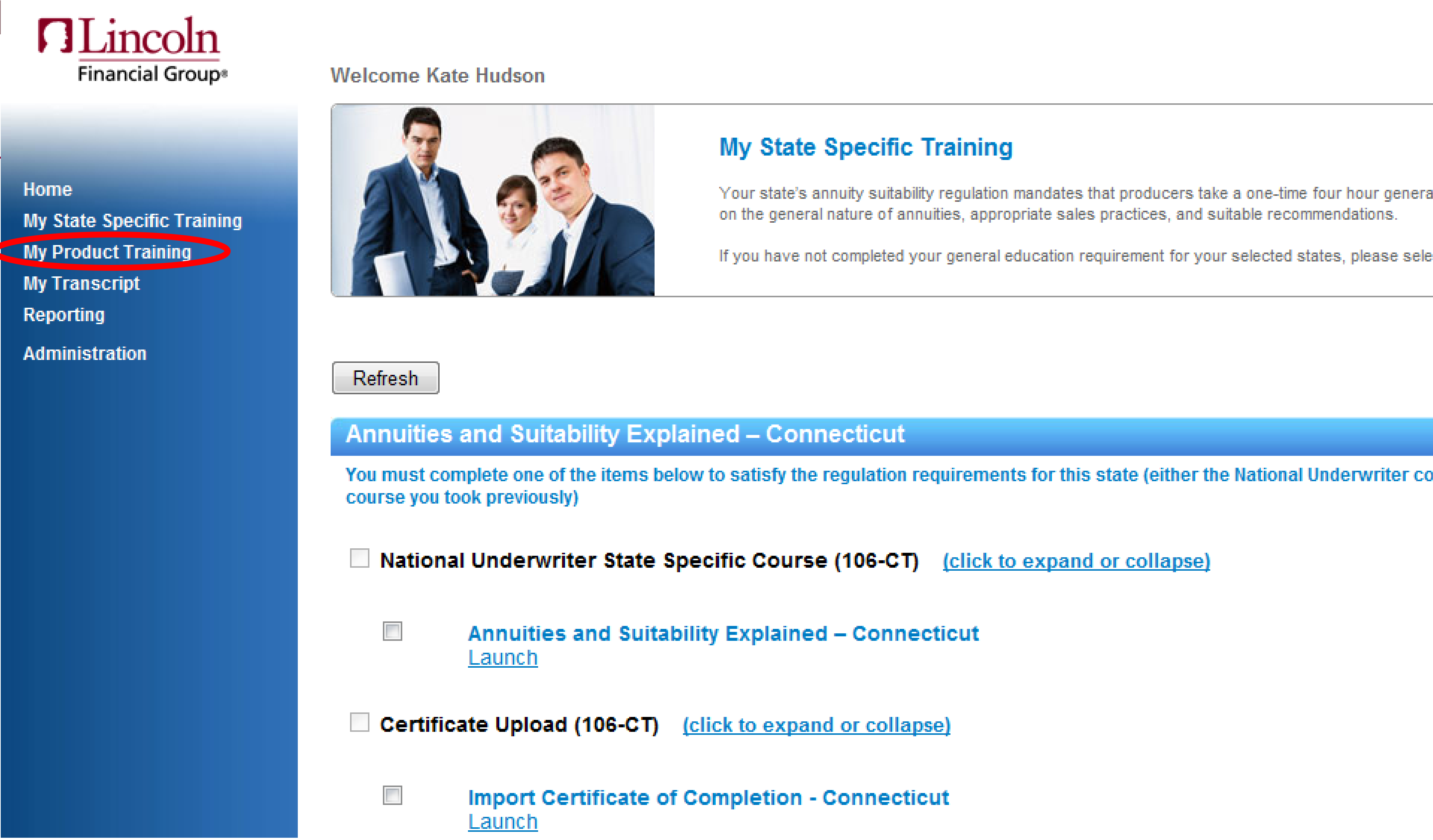
In providing this information, you authorize Kaplan to send current and historical completion data to your employer, the annuity carrier, broker/dealer and/or a centralized data warehouse, indicating that you have completed annuities product training.

General Terms & Conditions

DTCC Terms & Conditions

Security: Personal Information is sent and received over secure HTTPS channels.

To report the completion to Lincoln, enter your Insurance License number and your Social Security number. When completed, click “Continue to Course” to take the training.



When you have completed your state annuity training through Kaplan, return to the browser window that has the LIMRA website open.

Click on “My Product Training” located on the left menu.

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Welcome Kate Hudson

Request Support | My Profile | Edit Text

My Training

Here you can access all the required training and courses to satisfy your state's annuity suitability regulations. Please check back often as the train will be updated as required by state regulatory changes and product line-up changes. Product-specific training as mandated by regulation must be updated when product availability and features are updated, and producers must complete the updated training in order to continue selling annuities

Click on the course name to launch a course. You must click the "Refresh" button to view completion checkmarks.

Refresh

Lincoln Financial Product Specific Training *Broker: Lincoln Financial*

Completion of the following product courses is required for producers who sell our annuity products. This training includes information and product features unique to Linc Financial Group's specific annuity products. You need only complete the courses associated with the product lines you sell.

☐ **Variable Annuities** (click to expand or collapse)

Date Completed

☐ **Variable Annuities Course (VA.3.0)**
Launch

☐ **Fixed Annuities** (click to expand or collapse)

Date Completed

☐ **Fixed Annuities Course (FA.2.0)**
Launch

On the product-specific training page, select the product line(s) with which you are affiliated to take the required course(s).

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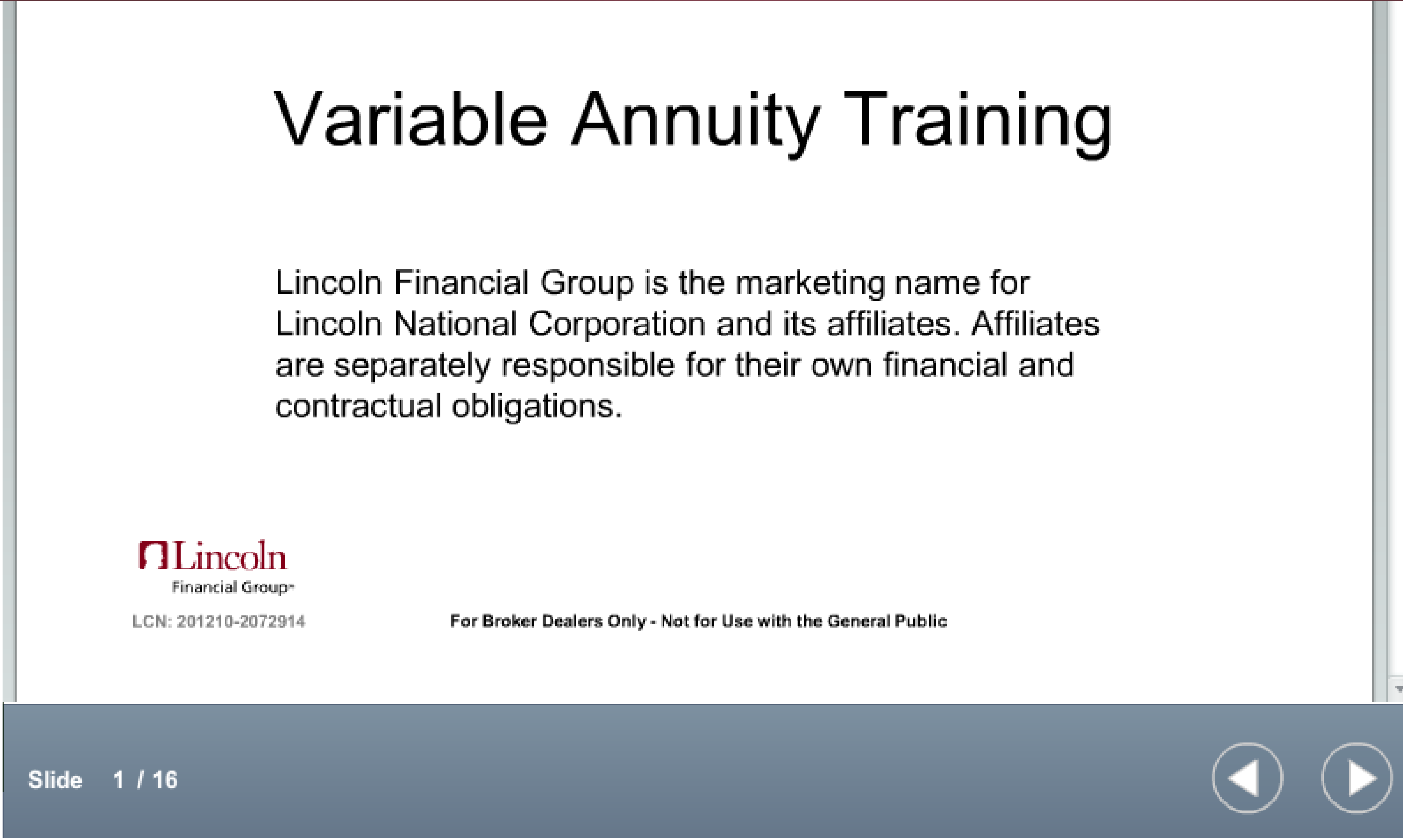

The PowerPoint training course will open for the product line you selected. Read each slide carefully. When the training is complete, you will be certified to sell your lines of authority!

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