

New NAIC Best Interest Standard

TRAINING INSTRUCTIONS

RegEd offers the new 4-hour CE training course and the additional 1-hour CE training course to producers.

- 1 Go to the RegEd website at:
<https://secure.reged.com/TrainingPlatform/>



The screenshot shows the RegEd website interface. At the top left is the IRI (Insured Retirement Institute) logo. To its right is the RegEd logo. On the far right is a login section with fields for 'Login Email Address' and 'Password', a 'Go' button, a 'Save User Name' checkbox, and a 'Forgot my password?' link. Below the header is a navigation bar with links: 'TRAINING PLATFORM >>', 'RULES AND REGULATIONS', 'NEWS', 'CONTACT US', and 'ABOUT US'. The main content area features a welcome message: '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.' Below this, there are three main sections: 'Participating Carriers' on the left, a map of the United States in the center, and 'Producers Get Started' on the right. The 'Participating Carriers' section lists: Standard Insurance Company, Symetra Life Insurance Company, Transamerica Life Insurance Company, and Variable Annuity Life Insurance Co. (VALIC). The 'Producers Get Started' section has a numbered list: 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 list is a button for 'Other Available CE Courses' with a right-pointing arrow. At the bottom right is a 'News' section with the headline: 'RegEd Announces COVID-19 Resource Center'.

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- ② If this is your first visit to the RegEd/IRI Annuities Training Platform, you'll need to register on the site.

The screenshot shows the homepage of the RegEd/IRI Annuities Training Platform. At the top left is the IRI logo (Insured Retirement Institute). To its right is the 'RegEd' logo. On the far right is a login section with fields for 'Login Email Address' and 'Password', a 'Go' button, a 'Save User Name' checkbox, and a 'Forgot my password?' link. Below the header is a navigation bar with links: 'TRAINING PLATFORM >>', 'RULES AND REGULATIONS', 'NEWS', 'CONTACT US', and 'ABOUT US'. The main content area features a welcome message: '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.' Below this, there are two main sections. On the left, 'Participating Carriers' lists 'Standard Insurance Company' and 'Symetra Life Insurance'. In the center is a map of the United States with several states highlighted in purple. On the right, a box titled 'Producers Get Started' contains two steps: '1. Register online and create a profile.' and '2. Complete your state-mandated annuity training.'

- ③ Follow the on-screen instructions to complete the registration process.

Self Registration

Self Registration

The screenshot shows the 'Self Registration' form. It is divided into two main sections: 'Login Information' and 'Identifying Information'.
Login Information
The section title is 'Login Information'. Below it is a note: 'The security questions / answers are required to help you reset your password, if you forget your password.' The form fields are:
*Login Email: Cdelise@thequantum.com (with a note: 'Will be used as Login Name and Contact Email')
*New Password: (masked with dots)
*Verify New Password: (masked with dots)
*Security Question 1: Select Question (dropdown) and *Answer: (text field)
*Security Question 2: Select Question (dropdown) and *Answer: (text field)
*Security Question 3: Select Question (dropdown) and *Answer: (text field)
A note at the bottom of this section states: '(You must select 3 different questions and provide 3 different answers which do not match your password.)'
Identifying Information
The section title is 'Identifying Information'. Below it is a note: 'We require your Social Security Number and Date of Birth to process your CE as per state requirements.' The form fields are:
Prefix: (dropdown)
*First Name: (text field)
*Last Name: (text field)
MI: (text field)
Sfx: (text field)
*Social Security #: (text field with dashes)
*Verify Social Security #: (text field with dashes)
*Date of Birth: (dropdowns for month, day, and year)
*National Producer Number (NPN): (text field)
A 'Find NPN' button is located next to the NPN field.

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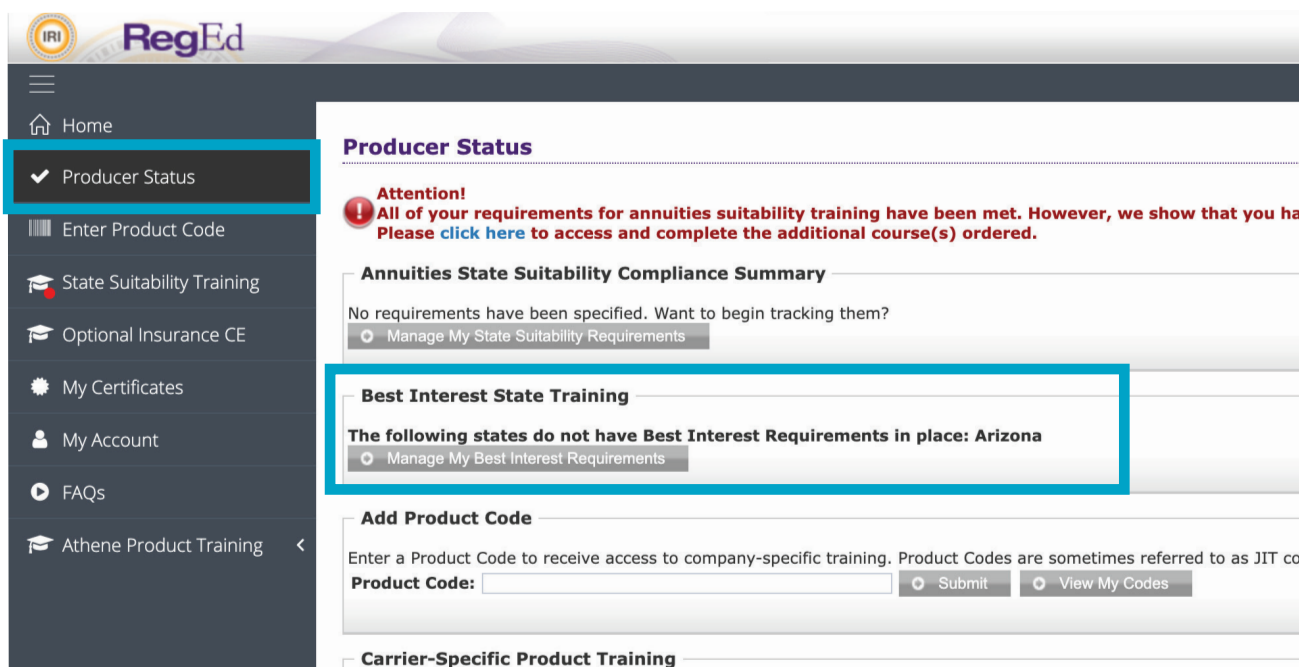
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- ④ After registration login to RegEd using the name and password you selected.



The image shows the RegEd website login page. At the top left is the IRI logo (Insured Retirement Institute). To its right is the RegEd logo. Below the logos is a navigation bar with links: TRAINING PLATFORM, RULES AND REGULATIONS, NEWS, CONTACT US, and ABOUT US. A login box is highlighted with a blue border, containing fields for 'Login Email Address:', 'Password:', a 'Save User Name' checkbox, and a 'Forgot my password?' link. Below the navigation bar is a welcome message: '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.' Below this are two main sections: 'Participating Carriers' (listing Standard Insurance Company and Symetra Life Insurance Company) and 'Producers Get Started' (listing steps: 1. Register online and create a profile, 2. Complete your state-mandated annuity training.). A map of the United States is visible in the background.

- ⑤ Select **Producer Status** and from the training list, select the applicable state course and begin the training.




The image shows the RegEd website's 'Producer Status' page. On the left is a dark sidebar with a menu: Home, Producer Status (highlighted with a blue box), Enter Product Code, State Suitability Training, Optional Insurance CE, My Certificates, My Account, FAQs, and Athene Product Training. The main content area has a header 'Producer Status'. Below it is an 'Attention!' message: 'All of your requirements for annuities suitability training have been met. However, we show that you have additional course(s) ordered. Please click here to access and complete the additional course(s) ordered.' Below this is a section 'Annuities State Suitability Compliance Summary' with the text 'No requirements have been specified. Want to begin tracking them?' and a button 'Manage My State Suitability Requirements'. Below that is a section 'Best Interest State Training' with the text 'The following states do not have Best Interest Requirements in place: Arizona' and a button 'Manage My Best Interest Requirements' (highlighted with a blue box). Below this is a section 'Add Product Code' with the text 'Enter a Product Code to receive access to company-specific training. Product Codes are sometimes referred to as JIT codes.' and a form with 'Product Code:' and buttons 'Submit' and 'View My Codes'. At the bottom is a section 'Carrier-Specific Product Training'.

- ⑥ If the course is not shown in the list, access the course via the **Optional Insurance CE Catalog** on the RegEd site. The course number and names are as follows:

The screenshot shows the RegEd website interface. On the left is a dark sidebar with a menu. The 'Optional Insurance CE' item, represented by a graduation cap icon, is highlighted with a blue box. The main content area is titled 'Producer Status'. It features an 'Attention!' alert stating that requirements for annuities suitability training have been met, but additional courses are required, with a link to 'click here'. Below this are sections for 'Annuities State Suitability Compliance Summary', 'Best Interest State Training' (noting that Arizona does not have these requirements), and 'Add Product Code' (with a text input field and 'Submit'/'View My Codes' buttons). A 'Carrier-Specific Product Training' section is partially visible at the bottom.

The screenshot shows the 'My Courses' page on the RegEd website. The sidebar on the left has the 'My Courses' icon (a graduation cap) highlighted. The main content area has tabs for 'Active Courses' and 'Course History'. Under 'Order Instructions', it provides guidance on how to order new courses or access existing ones. Two buttons are present: 'Select New Courses and CE Credit' (highlighted with a blue box) and 'Order Additional Insurance Credit'. Below these is a table header with columns for 'Course Name', 'State or Professional Designation CE Status', and 'Course'.



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1 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

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



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1 Select Your License

2 Choose Courses / CE >>

Place Your Order

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. If you have completed a course, select **Proceed**.

3 Matches found for "49" within the filtered list:

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

Add Course	Course Name and CE Credit Available
<input type="checkbox"/>	Recommending Annuities Under the NAIC Best Interest Standard (490)
<input type="checkbox"/>	Recommending Annuities Under the NAIC Best Interest Standard, Indiana (490_IN)
<input type="checkbox"/>	Recommending Annuities Under the New NAIC Best Interest Standard - 1 Hour Update Course - Indiana (491_IN)

Course 491 - Recommending Annuities Under the New NAIC Best Interest Standard - 1 Hour Update Course

Course 490 - Recommending Annuities Under the NAIC Best Interest Standard - 4 Hour Update Course

- 7 Print a copy of your completed training for your records and proof of training for insurance carriers upon request.

