

## NWL product training courses currently available on RegEd

- NWL® Capital Solutions (JIT Product Code: [nwlcapital](#))
- NWL® ChoiceOptimizer (JIT Product Code: [nwlchoiceopt](#))
- NWL® Dynamic Series (JIT Product Code: [nwldynamic](#))
- NWL® Impact Series (JIT Product Code: [nwlimpact](#))
- NWL® Lifetime Returns Solutions (JIT Product Code: [nwlsolutions](#))
- NWL® New Frontiers (JIT Product Code: [nwlnewfrontiers](#))
- NWL® Single Premium Immediate Annuity (SPIA) (JIT Product Code: [nwlspia](#))
- NWL Protector One® (JIT Product Code: [nwlprotector](#))
- NWL® Ultra Series (JIT Product Code: [nwlultra](#))

**Step 1.** Navigate to <https://secure.reged.com/TrainingPlatform/>

Existing users, log in using your current credentials.

The screenshot shows the RegEd website interface. At the top left is the IRI Insured Retirement Institute logo. To the right is the RegEd logo and a login form with fields for 'Login Email Address:' and 'Password:', a 'Go' button, a 'Save User Name' checkbox, and a 'Forgot my password?' link. Below the logo is a navigation menu with links for 'TRAINING PLATFORM >>', 'RULES AND REGULATIONS', 'NEWS', 'CONTACT US', and 'ABOUT US'. A welcome message 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.' Below this is a 'Participating Carriers' section with a map of the United States. To the right of the map is a 'Producers Get Started' section with a list of steps: 1. Register online and create a profile. 2. Complete your state-mandated annuity training. 3. Complete Carrier-specific courses as they become available. A red arrow points to the login form, and another red arrow points to the 'Producers Get Started' section.

**New users:**

**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:  Select Question  \*Answer:

\*Security Question 2:  Select Question  \*Answer:

\*Security Question 3:  Select Question  \*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:  \*States:  Select a state  \*Zip Code:

\*Country:  United States

\*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

## Access Product Training

Upon login, the Producer Status page displays all currently assigned and ordered carrier-specific product training. Assigned product training courses are also accessible from the left frame menu, grouped by Carrier name.

- Home
- Producer Status
- Enter Product Code
- State Suitability Training
- Optional Insurance CF
- My Certificates
- My Account
- FAQs
- Demo Carrier 2
- Demo Carrier 1

### Producer Status

**Annuities State Suitability Compliance Summary**

Continuing Education	Requirement Met	Product Type	Change Status
California	No	No see details below	All <input type="button" value="v"/> Order Course
Florida	No	N/A - Not Required	All <input type="button" value="v"/> Order Course
Illinois	No	N/A - Not Required	All <input type="button" value="v"/> Order Course
Texas	No	N/A - Not Required	All <input type="button" value="v"/> Order Course

California - Resident and non-resident agents must complete 8 hours of initial training before selling annuities. Resident and non-resident agents must complete 4 hours of ongoing training education each license renewal period thereafter. Agents are advised to consult the state department of insurance to ensure that they have met this requirement.

Texas - Please ensure the correct dates are entered for your license. Resident and non-resident producers must complete 4 hours of initial training before selling annuities. Texas resident producers selling annuities must also complete 8 hours of continuing education in annuities each license period.

The following states do not have annuity suitability requirements in place: North Carolina, Nevada and Utah

[Manage My State Suitability Requirements](#)

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**Best Interest State Training**

State	Requirement Met	Product Type	Change Status
New York	No	All	All <input type="button" value="v"/> Order Course

The following states do not have Best Interest Requirements in place: California, Florida, Illinois, North Carolina, Nevada, Texas and Utah

[Manage My Best Interest Requirements](#)

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**Add Product Code**

Enter a Product Code to receive access to company-specific training. Product Codes are sometimes referred to as JIT codes

Product Code:

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**Carrier Specific Product Training**

Requirement	Completion Date	Requirement Status
<b>Demo Carrier 2</b>		
Overview of Retirement Planning (422)		<input type="button" value="Go To Requirement"/>
Demo Carrier 2 - Course C (DemoCourseC)		<input type="button" value="Go To Requirement"/>
Demo Carrier 1 - Course A (DemoCourseA)	07/21/2018	Completed
Demo Carrier 1 - Course B (DemoCourseB)	07/21/2018	Completed
Demo Carrier 2 - Course A (DemoCourseA)	07/21/2018	Completed

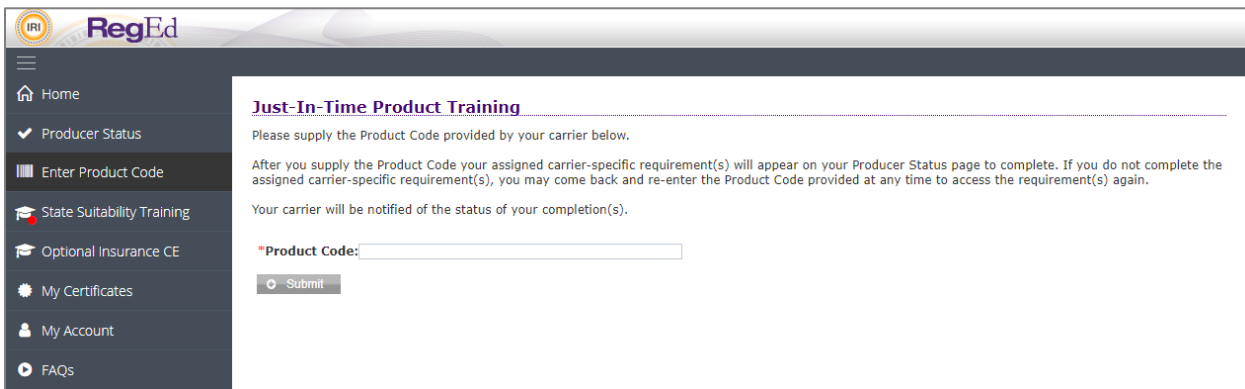
Although RegEd, Inc. takes reasonable steps to ensure that the information displayed through the Annuities Training Platform is current and correct based on the data provided to it, it neither warrants nor guarantees its accuracy or timeliness. Producers should verify their product training and continuing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

## Enter NWL Product Code

- NWL® Capital Solutions (JIT Product Code: **nwlcapital**)
- NWL® ChoiceOptimizer (JIT Product Code: **nwlchoiceopt**)
- NWL® Dynamic Series (JIT Product Code: **nwldynamic**)
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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 **Add Product Code** section on the Producer Status page, or
- 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.

## Complete Product Specific Training

Select a course from the Producer Status page, then select **Proceed** to begin the course.

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.

NWL course completions are reported to NWL automatically. You may print or save a copy of your certificate for your records.

## Optional Additional Features

### State Annuity Suitability Training

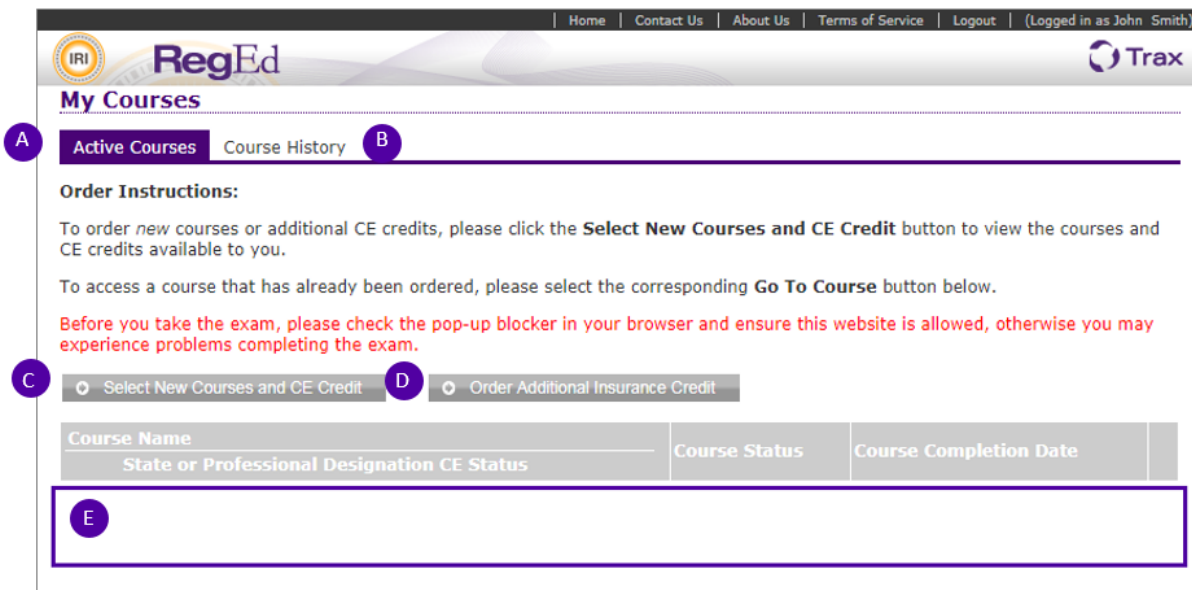
Users are able to gain access to RegEd’s annuities suitability courses designed to meet state training requirements. The user is able to order insurance CE credit(s) with the courses. NWL is automatically notified of annuity suitability courses completed on RegEd’s platform. If you take a course with another vendor, you will need to provide a copy of your course completion to NWL.



The screenshot shows the RegEd website interface. At the top right, there are links for Home, Contact Us, About Us, and Terms of Service. The main header includes the IRI logo and the RegEd logo. A left-hand menu is visible with the following items: Welcome John Smith, Producer Status, Enter Product Code, State Suitability Training (highlighted in purple), Optional Insurance CE, My Certificates, My Account, FAQs, Forethought Annuity Product Training, Great-West Product Training, Nationwide Annuity Product Training, and Sammons Retirement Solutions Product Training. The main content area is titled "State Suitability Training" and contains the following text: "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:" followed by a bulleted list: "Designed to meet state training requirements", "Available for Insurance CE credit(s). Certification and state fees may apply.", and "Reported to participating carriers on the RegEd/IRI Annuity Training Platform". To the right of this text is a map of the United States with several states highlighted in purple. Below the list, there is a paragraph: "To access RegEd's State Suitability Training courses available to you please select the Proceed button below." and a "Proceed" button.

Select **State Suitability Training** from the left menu.

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



## 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.



### Product Training & CE Options

Do you want to receive CE credit(s), where available, with your Product Training completion(s)?


I want to receive CE credit(s) with my Product Training completion(s)  
 I DO NOT want to receive CE credit(s) with my Product Training completion(s)

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

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**.

[Home](#) | [Contact Us](#) | [About Us](#) | [Terms of Service](#) | [Logout](#) | (Logged in as John Smith)



### 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) ⓘ <i>Annuities State Suitability Approved In: <a href="#">AL, LA</a></i>		\$0.00	<input type="button" value="Remove"/>
Producer CE Credit for Louisiana	4.0 Annuities <b>ClearCert Annuities Approved</b>	\$0.00	<input type="button" value="Remove"/>
CE Credit for Alabama <i>Alabama State Fee</i>	4.0 General <b>ClearCert Annuities Approved</b>	\$0.00 0.00	<input type="button" value="Remove"/>
		<b>Grand Total:</b>	<b>\$0.00</b>

\* 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

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.

## Administrative

### My Certificates

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

### 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.