

# Mass Mutual

## REQUIRED NY REGULATION 187 TRAINING INSTRUCTIONS

Effective, 8/1/2019 for Annuities and 2/1/2020 for Life, **New York Regulation 187** requires both resident and non-resident producers to be appropriately trained in suitability and to act in the best interest of a client's financial objectives. Completion of industry training, administered by a vendor, along with carrier specific product training are required prior to soliciting new business or servicing existing policies previously written in NY. Failure to complete these courses will result in declined business or rejection of servicing rights.

Proof of completion of the industry training must be provided to ECA Marketing. Email certificates to [licensing@ecamarketing.com](mailto:licensing@ecamarketing.com). If taken with LIMRA, a date of completion is required.

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### **Industry Training Requirement**

Not all vendors are universally accepted amongst the insurance carriers

### **Which vendors are accepted?**

RegEd, Kaplan, QuestCE and LIMRA are the only vendors Mass Mutual will accept. If taken through an unapproved vendor, completion of an additional course will be required.

### **Carrier Specific Product Training Requirement**

Training must be completed prior to the sale of both Life and Annuities

### **When can the product training be taken?**

Product training can be taken at any time. Product training can be taken/dated the same day new business is solicited.

**Product Training Directions:** See next page for product training directions.

# NY Regulation 187: MMFA (CAS) Broker Training – Quick Start

Trying to plan your time and create your learning path to success for NY Regulation 187 training? Use these instructions to access the required to see MassMutual proprietary life insurance to clients with a contract state of NY as of 1/25/2020 or MassMutual Worksite policies / certificates to plan participants or employers in New York as of 1/25/2020.

## Required Life Product Training

You need to complete the appropriate training module **prior** to submitting business for the product. *Follow the instructions on the right to access this training on MassMutual powered by RegEd.*

### Life Insurance Product Training

MassMutual's MMFA Whole Life Insurance Portfolio (2019) (60 min.)

MassMutual's MMFA Term Life Insurance Portfolio (2019) (20 min.)

MassMutual's MMFA Hybrid Life & LTC Insurance Products – CC1 and CCS (2019) (60 min.)

MassMutual's MMFA Universal Life Guard & Survivorship Universal Life Guard Insurance Products (2019) (40 min.)

MassMutual's MMFA Variable Universal Life III Product (2019) (40 min.)

### Worksite Product Training

MassMutual@Work Group Whole Life and Universal Life Insurance (60 min.) (December)

MassMutual's Executive Group Life Insurance (60 min.) (December)

## To Access MassMutual Proprietary Product Training on: MassMutual powered by RegEd

- Go to [www.reged.com](http://www.reged.com)
- Select **Secure Login**
- Select **RegEd Compliance Management**

Redeem CE Coupon Course Catalog **Secure Login**

Select Your Solution  
**REGED COMPLIANCE MANAGEMENT**  
 INDUSTRY TRAINING PLATFORM

- Enter the following in the appropriate fields
  - User Name:** Your MassMutual AA #
    - Note!** 7 digits are required, so if the AA# is 123456, then add zeros at the beginning to make the number 7 digits long. For example: **0123456**
  - Password:** Reenter the user name above, plus the first four characters of the last name.
    - Example:** If the last name is Smith, then enter: **0123456smit**
  - Company Code:** **MML\_ATTP** (In all capital letters)

- The MassMutual proprietary training modules for life insurance appear on the screen

Completion Status	Assessment	Assessment Type
Not Completed	MassMutual's MMFA Whole Life Insurance Portfolio (2019 Training) (11MassMutual_02) -> Go To Course	MassMutual Annuity Product Training Suite
Not Completed	MassMutual's MMFA Universal Life Insurance Portfolio (2019 Training) (11MassMutual_03) -> Go To Course	MassMutual Annuity Product Training Suite
Not Completed	MassMutual's MMFA Variable Universal Life III Product (2019 Training) (11MassMutual_04) -> Go To Course	MassMutual Annuity Product Training Suite
Not Completed	MassMutual's MMFA Hybrid Life & LTC Insurance Portfolio (2019 Training) (11MassMutual_05) -> Go To Course	MassMutual Annuity Product Training Suite
Not Completed	MassMutual's MMFA Universal Life Guard & Survivorship Universal Life Guard Insurance Products (2019 Training) (11MassMutual_06) -> Go To Course	MassMutual Annuity Product Training Suite
Not Completed	MassMutual's MMFA Variable Universal Life III Product (2019 Training) (11MassMutual_07) -> Go To Course	MassMutual Annuity Product Training Suite
Not Completed	MassMutual's MMFA Universal Life Insurance Portfolio (2019 Training) (11MassMutual_08) -> Go To Course	MassMutual Annuity Product Training Suite
Not Completed	MassMutual's MMFA Term Life Insurance Portfolio (2019 Training) (11MassMutual_09) -> Go To Course	MassMutual Annuity Product Training Suite
Not Completed	MassMutual's MMFA Hybrid Life & LTC Insurance Portfolio (2019 Training) (11MassMutual_10) -> Go To Course	MassMutual Annuity Product Training Suite
Not Completed	MassMutual's MMFA Universal Life Insurance Portfolio (2019 Training) (11MassMutual_11) -> Go To Course	MassMutual Annuity Product Training Suite
Not Completed	MassMutual's MMFA Variable Universal Life III Product (2019 Training) (11MassMutual_12) -> Go To Course	MassMutual Annuity Product Training Suite
Not Completed	MassMutual's MMFA Universal Life Guard & Survivorship Universal Life Guard Insurance Products (2019 Training) (11MassMutual_13) -> Go To Course	MassMutual Annuity Product Training Suite
Not Completed	MassMutual's MMFA Variable Universal Life III Product (2019 Training) (11MassMutual_14) -> Go To Course	MassMutual Annuity Product Training Suite
Not Completed	MassMutual's MMFA Term Life Insurance Portfolio (2019 Training) (11MassMutual_15) -> Go To Course	MassMutual Annuity Product Training Suite

## Notes & Tips!

- The system will time about 30 min. after starting the course. Select **Continue** to resume completion of the training
- Complete your training on the same device (bookmarking does not save across devices).
- Be sure to finish the **Attestation** slide at the end of the course to log your completion and ensure that the course indicates 100% complete.
- For technical questions on accessing or navigating within the RegEd site, please contact RegEd's Customer Support at 800.334.8322, Monday through Friday.