

# New York Life

## REQUIRED NY 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.

### Industry Training Requirement

Not all vendors are universally accepted amongst the insurance carriers

#### Which vendors are accepted?

New York Life will only accept the below vendors. If taken through an unapproved vendor, completion of an additional course will be required.

A.D. Banker & Company, LLC	LIMRA
Broker Educational Sales & Training	National Underwriter Company
Cape Schools, Inc.	Quest Continuing Education Solutions
Clien Tell, Inc.	RegEd
Insurance Career Training, Inc.	WebCE
Kaplan Financial	

### 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 only be taken once the agent contract is active. New York Life will add the product training course to LIMRA for the agent to complete at that time. Product training can be taken the same day new business is solicited.

**Product Training Directions:** Go to: <https://knowledge.limra.com/LimraLogin.aspx>

- Log in- Username is your NPN
- Select BI (Best Interest: NY Reg 187 for Producers)
- Select New York Life Product Training