

Lincoln Financial

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. 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?

Lincoln will accept RegEd, LIMRA, Kaplan, QuestCE and SuccessCE. 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: Go to: <http://naic.pinpointglobal.com/LincolnFinancial/Apps/default.aspx>

- Log in or Register
- Select My Product training and select the required course
- Courses available:
 - Fixed Annuities (FA 12.0)
 - Lincoln Fixed Individual Life Insurance Nov 2019
 - Lincoln MoneyGuard

Please Note: If you are registering on the site, please select 'Other' in the Select Firm/ Broker Dealer section.