

Transamerica

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?

All vendors are accepted.

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 that new business is solicited.

Product Training Directions: The training is available through the RegEd Training Platform.

1. Go to: <https://secure.reged.com/TrainingPlatform/>
2. Log in or register
3. On the Product Status page, select Enter Product Code
4. "Enter Product Code" < enter the corresponding training code (below):

Product:

Final Expense Portfolio Training
Financial Foundation IUL

RegEd Product Code:

TLFINALEXP
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