

Gerber Life Insurance Company

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?

Gerber will accept any vendor that is approved by the NY Department of Financial Services. 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 is available at any time. Completion of the training will not affect approval of the agent contracting. Product training can be taken/dated the same day that new business is solicited.

Product Training Directions: Training can be completed through the carrier's website. For agents that already have an agent code, please use the below instructions to complete training.

1. Go to www.gerberlifeagency.com and log in.
2. Hover over "Documents" and select "Agent Documents" from the drop down menu.
3. Scroll down to "Training Materials" and open the training presentation that corresponds to the product being sold.

For agents that do not have an agent code, please contact an ECA Marketing licensing representative to provide the necessary materials. Gerber is not currently tracking the review or completion of product training, but this is subject to change at any time.