Symetra

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?
Symetra will only accept the vendors listed below. If taken through an unapproved vendor, completion of an additional course will be required.

A.D. Banker & Company LLC	On-Site Insurance School
Broker Educational Sales and Training	POHS Educational Centers
Cape School Inc	Quest Continuing Education Solutions
SuccessCE (ClienTell, Inc.) Insurance Career Training, Inc.	United Insurance Educators, Inc
Kaplan	WebCE
RegEd	
National Underwriter Company	

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: https://www.symetra.com/training (turn off pop-up blocker before starting course)

- Training can be taken through RegEd or Kaplan (Kaplan is preferred)
- Instructions for new and existing users for both RegEd and Kaplan are listed on the training page.
- Each product has its own course (10-15 minutes each).