Foresters 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. 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?
RegEd is the preferred vendor but if training was completed through a different vendor, the agent can submit the course outline and their certificate of completion, if issued, to Foresters and they will review the completed training for potential approval.

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?
Training must be completed prior to writing business. Agents will receive an email from the carrier providing access to the website and training after contracting is submitted.

Product Training Directions:

1. Log in to carrier website here
2. Click on "Login" and select "ezbiz"
3. Click on "Knowledge Zone" and select "Regulation 187 – New York"
4. Click on "Meeting your Training Requirements"
5. Click on "NY Regulation 187 Product Training" and review the PowerPoint Presentation
6. Click on "Training Certification Form" and complete and email the Training Certification Form to agencyadmin@foresters.com and copy licensing@ecamarketing.com