American National NY

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?

LIMRA and RegEd are the preferred vendors, however, with submission of a completion certificate; WebCE, QuestCE and Kaplan will also be accepted. American National will not accept training through any other vendors. 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:

Go to https://img.anicoweb.com/wps/portal/img/home/expertoffice/quicklinks/agent%20training?WT.mc_id=

➢ Already appointed? Select "Go to My Learning Plan" and sign in. Once signed in, select course.

➢ Not yet appointed? Select "Non-Appointed Training". Fill out the information requested and Submit. Then go to My Learning Plan and select the course.