RegEd

ATP Producer

Getting Started Guide



Annuities Training Platform Getting Started Guide for Producers

As the leading industry platform with several large carriers, RegEd's Annuity Training Platform is the solution for reducing this training burden and keeping producers focused on selling. The platform:

- ... Provides the ability for producers to meet multiple carrier requirements on one platform. RegEd's Annuity Training Platform makes it easy for producers to register and take the necessary state suitability and carrierspecific product training courses.
- •... Is the one place where distributors can see an agent's complete compliance profile for annuities training. This includes both the state suitability requirements and carrier-specific product training.
- ... Ensures producer compliance with the state suitability requirements for the states in which they sell annuities. The platform has an extensive rule base to determine reciprocity rules and initial and ongoing training requirements.
- •... Already has several of the leading carriers and their producer populations participating on the platform.

Here is how producers can get started:

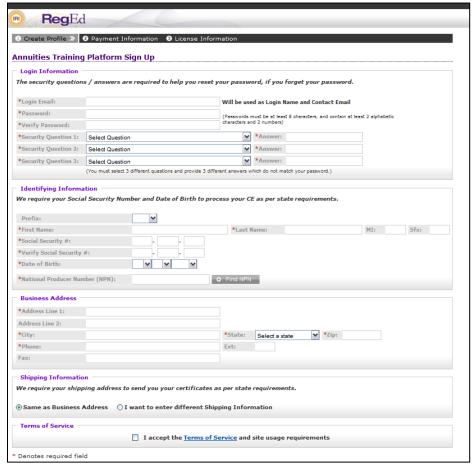
Producer Registration

- 1) Go to https://secure.reged.com/TrainingPlatform/.
- 2) Select "Sign Up" in the top right hand corner.





3) **Complete** the registration form.



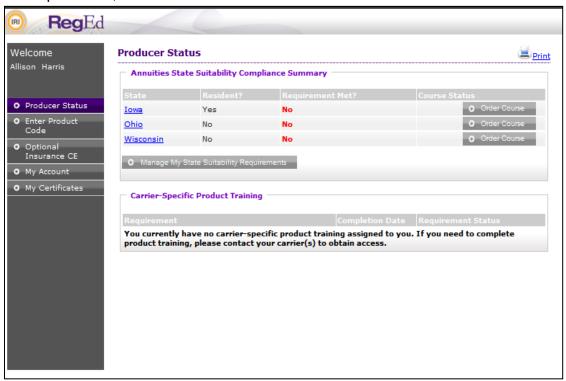
4) **Indicate** the state(s) where you sell or will be selling an annuity product and supply the required information.



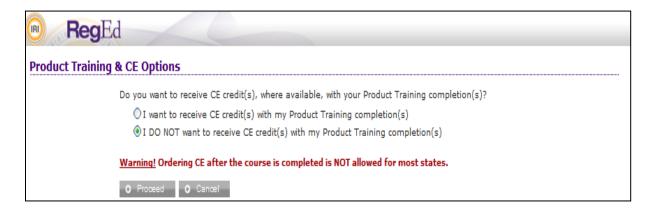


Producer Status: State Suitability Training

 In order to access your state suitability training (i.e. the 4-hour state requirement, select "Order Course".

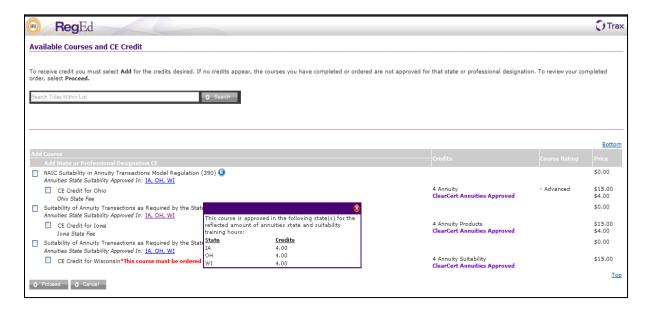


 Indicate whether you would like to complete your state suitability training course with or without Continuing Education (CE) credit. NOTE: many states do not allow post-ordering of CE credit once a course has been completed.

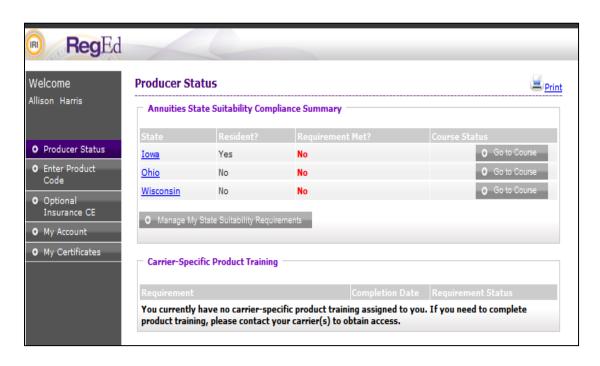




3) Select the course(s) and/or CE credit you wish to order and complete your order. To view which courses are reciprocal (i.e. these courses have been approved in the states listed by the participating carriers on the ATP platform) select the **hyperlink** next to "Annuities State Suitability Approved In:" section.



4) Once your order has been completed, select "**Go To Course**" to access the training.

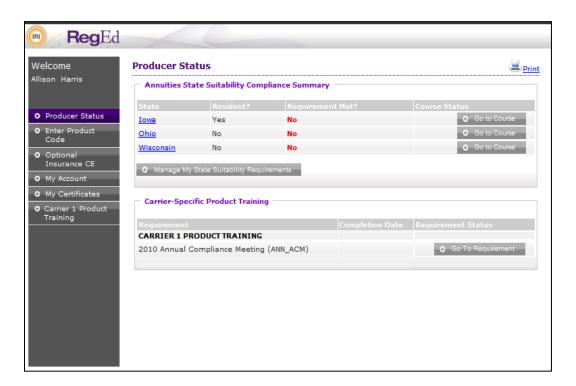




5) To update your product training requirements (i.e. add/remove states) select **Manage My State Suitability Requirements**.

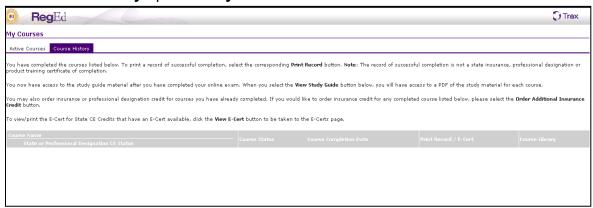
Producer Status: Carrier-Specific Product Training

 To access carrier-specific product training that has been assigned to you select "Go To Requirement" for the applicable training listed on Producer Status. NOTE: if you do not see a carrier's product training assigned to you, please contact your carrier(s) in order to obtain access to the training(s).



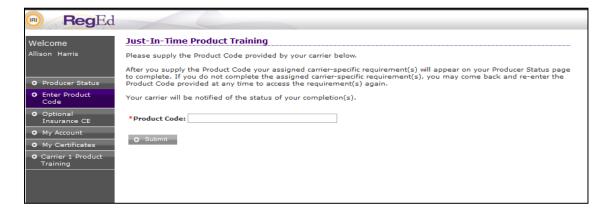


2) To access carrier-specific product training **records of completion** select the training module from the left-hand navigation menu and select the **Course History** option in **My Courses**.



Enter Product Code

 If you have a product training code provided by your carrier, select "Enter Product Code" via the left-hand navigation menu and enter the product code provided. Once your product code has been supplied you will be able to access it via Producer Status.



Optional Insurance CE

1) To view the Optional Insurance CE courses select "Optional Insurance CE" via the left-hand navigation menu.



2) Select "**Proceed**" to complete additional courses available to you at a discounted rate.



My Certificates

1) To view CE certificates of completion that have been issued to you select "My Certificates".

