

## Penn Financial's Guide to NY's Annuity Product Training

NYS requires completion of the appropriate company product training before you can submit any new business. This goes into effect on June 30. Each company will monitor your compliance, and return your new business paperwork if you haven't taken their training!

Company	Product Training Link	Here's what you have to do. Click links below for additional help navigating through the company's requirement	Helpful hints and what to expect
American Equity of NY	<a href="https://agent.american-equity.com/StateProductTraining.asp">https://agent.american-equity.com/StateProductTraining.asp</a>	Enter your information, read the materials, take the four question test.	You'll need your NYS life license number. There is a 4 question quiz at end. Just retry until you pass.
American National of NY	<a href="https://apps.anicoweb.com/Training/anny.aspx?WT.mc_id=IMG9014">https://apps.anicoweb.com/Training/anny.aspx?WT.mc_id=IMG9014</a>	Enter your info. Listen to the Brainshark presentation.	You must listen to the presentation to pass. There is no testing, but you will be timed to assure you listened.
First SunAmerica	<a href="http://www.brainshark.com/valic/vu?pi=zGaz11eXGTzhaMz0">http://www.brainshark.com/valic/vu?pi=zGaz11eXGTzhaMz0</a>	Enter your info in the Guestbook. Agree to statement at #67, under Contents.	Brainshark presentation. Click through slides, check box at end.
Genworth of NY	Liberty requires <a href="#">Training Form #46252QRG</a> Income Provider requires <a href="#">Training Form #113028NYOR</a> Smart Rate requires <a href="#">Training Form 38829</a> Independence requires <a href="#">Training Form 38107QRG</a>	Read Individual Training materials. When you submit business, you must attest to your training completion by submitting this form with your application: <a href="#">Product Training Attestation Form</a>	There is nothing in the training materials to mark or submit in order to complete a course. Just include the Product Training Attestation Form with your case
Lincoln Life of NY	<a href="http://naic.pinpointglobal.com/LincolnFinancial/Apps/default.aspx">http://naic.pinpointglobal.com/LincolnFinancial/Apps/default.aspx</a>	Lincoln uses the LIMRA site for their training. Complete the training section(s) for products you plan to sell.	You'll need your NPN <a href="https://pdb.nipr.com/html/PacNpnSearch.html">https://pdb.nipr.com/html/PacNpnSearch.html</a> .
National Integrity	<a href="http://www.wsfinancialpartners.com/RepTraining/default.php">http://www.wsfinancialpartners.com/RepTraining/default.php</a>	NI uses Kaplan to administer their training. There is a two question attestation at the end of it that you have to complete. Navigating through the Kaplan site is best done by call us for our NI <a href="#">Product Training Navigation</a> sheet that we prepared. You may want to print it out for use while on the Kaplan site.	You'll need your NPN <a href="https://pdb.nipr.com/html/PacNpnSearch.html">https://pdb.nipr.com/html/PacNpnSearch.html</a> . It's hard to navigate to the NI materials section, but couldn't be easier once you do. Use our directions in column to left. AOL browser will not work.
Penn Mutual	<a href="https://www.pennmutual.com/pmlwebsite/home.action">https://www.pennmutual.com/pmlwebsite/home.action</a>	Navigating through Penn Mutual's website is best done by calling for our PML Product Training Navigation sheet. You may want to print it out for use	You must be appointed first. Register for PML's website, then log in with user name and password. Call us for directions to make your way to the training.

		while on the Penn Mutual site.	Then, listen to presentation. Once done, close window.
Presidential Life	<a href="https://learn.questce.com/presidentiallife/">https://learn.questce.com/presidentiallife/</a>	This is administered by Quest, and does not require pre-appointment with Presidential.	This is a 25 question test, and you must score 18 or more correct to pass. Scoring is now automated.
Principal Life	Principal uses the LIMRA site for its training. <a href="http://naic.pinpointglobal.com/Principal/Apps/default.aspx">http://naic.pinpointglobal.com/Principal/Apps/default.aspx</a> Your LIMRA AML training user name and password will NOT work.	Register on the welcome page. Your firm is Penn-Financial Marketing. Click through the slides. In order to complete each section, you must put a check in the box on the next-to-the-last slide. Do this for each annuity presentation.	You'll need your NPN <a href="https://pdb.nipr.com/html/PacNpnSearch.html">https://pdb.nipr.com/html/PacNpnSearch.html</a> . LIMRA link is not compatible with IE9, but call us for a work-around.
Security Mutual	Awaiting information from company		
Allianz of NY	<a href="https://www.allianzlife.com/Security/LogIn.aspx?ReturnUrl=%2fIIIG%2fEducationCenter%2fBusinessBuilder.aspx%3frmid%3d05_18_2011_efix2083_campaign%26rrid%3d2671064000&amp;rmid=05_18_2011_efix2083_campaign&amp;rrid=2671064000">https://www.allianzlife.com/Security/LogIn.aspx?ReturnUrl=%2fIIIG%2fEducationCenter%2fBusinessBuilder.aspx%3frmid%3d05_18_2011_efix2083_campaign%26rrid%3d2671064000&amp;rmid=05_18_2011_efix2083_campaign&amp;rrid=2671064000</a>	Register for password and user name first. Then proceed through training links. This may be best done by call for our Allianz Product Training Navigation sheet. You may want to print it out for use while on the Allianz site.	The Disclosure Section has a quiz. You are allowed to get one wrong, otherwise you have to start the quiz again.