

Producer Annuity Training Requirements



A PRODUCER MUST COMPLETE THE FOLLOWING SAGICOR AND/OR STATE REQUIRED TRAINING COURSES.

REQUIREMENT FOR ALL PRODUCERS:

- Anti-Money Laundering training¹

REQUIREMENT FOR PRODUCERS SELLING ANNUITIES:

- General annuity suitability training². The training requirement is a key component of the National Association of Insurance Commissioners (NAIC) Suitability in Annuity Transaction Model Regulation;
- Sagicor product specific training for each annuity product that producer is going to sell.
- FIXED INDEXED ANNUITY SALES ONLY: Annuity indexed product training³.
- Iowa producers who wish to sell an indexed life or indexed annuity product need to complete 4-hours of CE on indexed products;

ANNUITY PRODUCT TRAINING REQUIREMENTS

SINGLE PREMIUM IMMEDIATE ANNUITY	SAGE CHOICE SPDA	SAGE SELECT FIA	SAGE SECURE FIA	MILESTONE MYGA
Annuity Suitability Training	Annuity Suitability Training	Annuity Suitability Training	Annuity Suitability Training	Annuity Suitability Training
Gold Series SPIA Product Training	Sage Choice SPDA Product Training	Sage Select FIA Product Training	Sage Secure FIA Product Training	Milestone MYGA Product Training

Questions? Contact the Producer Resource Center (PRC) at (888) 724-4267 ext. 4680 or PRC@SagicorLifeUSA.com.

¹ Please note AML training courses taken in the last 2 years can be submitted as proof of completion of this training requirements. We require that you email a copy of your certificate of completion or a training record issued by the CE provider to our Producer Appointment Department at producerappointment@sagicorlifeusa.com for review and acceptance

² Please note outside training courses can be submitted to fulfil this training requirement. Annuity Suitability course must be approved in a state that has previously adopted the NAIC Annuity Suitability Model Regulation. If you have taken an annuity suitability training course previously, we require that you email a copy of your certificate of completion or a training record issued by the CE provider to our Producer Appointment Department at producerappointment@sagicorlifeusa.com for review and acceptance.

³ Please note outside index training courses can be submitted to fulfil this training requirement. Indexed product course must be approved by a state for CE credit. If you have taken an indexed product training course previously, we require that you email a copy of your certificate of completion or a training record issued by the CE provider to our Producer Appointment Department at producerappointment@sagicorlifeusa.com for review and acceptance.