



Annuity Carrier Training Requirements

LIFE OF SOUTHWEST

National Life Group/Life of Southwest's online training instructions are provided below. In addition to these carrier product training requirements, please be sure that you are compliant with all state training requirements prior to taking applications in states that require National Association of Insurance Commissioners (NAIC) and/or Best Interest compliance.

In order to view the specific requirements of each state, please go to <https://www.reged.com/annuities-training-platform/> and complete all approved/required courses for your state of sale.

Follow the steps below to ensure compliance with Life of Southwest's training requirements and avoid delays:

For technical issues with the website or to confirm your training completion, please call 800.906.3310 to speak with a Life of Southwest representative.



Product Training:

- **New Agents** - The Agent Product Training will be completed within the online contracting application process.
 - Answer "YES" to the question: "Do you intend site outside of the contracting to sell annuity products?" The training link is provided. The Agent reviews the material and then selects the "I Certify" box (required field). When the contracting application is received, the agent will be IGO for the Annuity Product Training.

- **Existing Agents** - The Agent Product Training will be completed via the NLG web portal <https://www.nationallife.com>.
 - See the [State Required Product Training](#) document for further instructions.
 - You will need your agent login information for to register. Please call National Life directly for login assistance: 800-906-3310.

Contact CBS Brokerage for more information ☎ 763.450.1870