

# NWL product training courses currently available on RegEd

- NWL® ChoiceOptimizer (JIT Product Code: nwlchoiceopt)
- NWL<sup>®</sup> Dynamic Series (JIT Product Code: nwldynamic)
- NWL® Lifetime Returns Solutions (JIT Product Code: nwlsolutions)
- NWL<sup>®</sup> Single Premium Immediate Annuity (SPIA) (JIT Product Code: nwlspia)
- NWL Protector One<sup>®</sup> (JIT Product Code: nwlprotector)

### Step 1. Navigate to https://secure.reged.com/TrainingPlatform/



### Existing users, log in using your current credentials.

### New users:

Step 2. Select Register online on the right under Producers Get Started.



### **Step 3.** Complete the registration form.

Belf Registration									
ogin Information									
he security question	ns / answers	are required to help	you reset y	our password,	if you forget	your passwo	ord.		
*Login Email:			Will be used as Login Name and Contact Email						
*Password:				(Passwords	must be at least	B characters, and	contain at least 2	alphabetic	
*Verify Password:				characters a	nd 2 numbers)				
*Security Question 1:	Sele	ct Question			Answer:				
*Security Question 2:	Sele	Select Question			Answer:				
*Security Question 3:	Sele	Select Question		✓ *Answer:					
	(You r	nust select 3 different que	estions and provi	ide 3 different answ	ers which do not	match your pass	word.)		
Identifying Inform	ation								
<i>We require your Soci</i>		umber and Date of I	Birth to proc	ess your CE as	per state req	uirements.			
Prefix:		~							
First Name:				*Last Name:			MI:	Sfx:	
Social Security #:									
Verify Social Security	(#:								
*Date of Birth:		<b>~ ~</b>	~						
*National Producer No	umber (NPN):		0	Find NPN					
Business Address									
*Address Line 1:									
Address Line 2:									
*City:				*State: Selec	t a state	V	* Zip Code:		
				State: Selet	l a slate	•	Lip code.		
*Country:	United States		~						
*Phone:			E	Ext:					
Fax:									
Shipping Informati	ion								
We require your ship		to send vou vour ce	ertificates as	per state requ	irements.				
Same as Business	-			-					
				-					
Home Information									
Same as Business	Address OI	want to enter diffe	erent Home I	Information					
Terms of Service									
		I accept the	Terms of Ser	vice and site u	sage require	nents			
Denotes required field									
								Secure	
<b>)</b> Register <b>()</b> Cle	ar Form							Othawt	

# **Access Product Training**

Upon login, the Producer Status page displays all currently assigned and ordered carrier-specific product training. Assigned product training courses are also accessible from the left frame menu, grouped by Carrier name.

egEd			
			lot O
	Producer Status		
tatus	Annuities State Suitability Compliance Summary		
	State Resident? Requirement Met? 🚱	Product Type C	Course Status
oilty Training	California No No see details below Florida No N/A - Not Required	All	O Order Course
surance CE	Illinois No No	Al	O Order Course
	Texas No N/A - Not Required see details below		
	California - Resident and non-resident agents must complete 8 ho the state department of insurance to ensure that they have met t		ing before selling annuities. Resident and non-resident agents must complete 4 hours of ongoing training education each license renewal period thereafter. Agents are advised to
	Texas- Please ensure the correct dates are entered for your licens annulties each license period.	se. Resident and nor	on-resident producers must complete 4 hours of initial training before selling annuities. Texas Resident producers selling annuities must also complete 8 hours of continuing educ
	annuibes each license period.		
	The following states do not have appuits suitability require		
m7 (	The following states do not have annuity suitability require © Manage My State Suitability Requirements	ements in place: N	North Carolina, Nevada and Utah
	<ul> <li>Manage My State Suitability Requirements</li> </ul>	ements in place: N	North Carolina, Nevada and Utah
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## **Enter NWL Product Code**

- NWL<sup>®</sup> ChoiceOptimizer Product Code: nwlchoiceopt
- NWL® Dynamic Series (JIT Product Code: nwldynamic)
- NWL® Lifetime Returns Solutions (JIT Product Code: nwlsolutions)
- NWL<sup>®</sup> Single Premium Immediate Annuity (SPIA) (JIT Product Code: nwlspia)
- NWL Protector One<sup>®</sup> (JIT Product Code: nwlprotector)

Enter the code to immediately add the course as an available option on the Producer Status homepage. The product code can be entered:

- in the Add Product Code section on the Producer Status page, or
- by selecting Enter Product Code on the left-side menu and entering the code on that page

RegEd	
≡	
♠ Home	Just-In-Time Product Training
<ul> <li>Producer Status</li> </ul>	Please supply the Product Code provided by your carrier below.
IIII Enter Product Code	After you supply the Product Code your assigned carrier-specific requirement(s) will appear on your Producer Status page to complete. If you do not complete the assigned carrier-specific requirement(s), you may come back and re-enter the Product Code provided at any time to access the requirement(s) again.
🔁 State Suitability Training	Your carrier will be notified of the status of your completion(s).
🖻 Optional Insurance CE	*Product Code:
My Certificates	O Submit
Account	
FAQs	

After selecting **Submit**, you are returned to the Producer Status page and the new course is listed under the program status grid under Carrier-Specific Product Training.

# **Complete Product Specific Training**

Select a course from the Producer Status page, then select **Proceed** to begin the course.

Use the buttons ( [ ] [ ] [ ] [ ] ) in the bottom middle of the page to navigate through the course. There is an X button in the top right to leave the course ( ] and return at a later date.

NWL course completions are reported to NWL automatically. You may print or save a copy of your certificate for your records.



# **Optional Additional Features**

#### **State Annuity Suitability Training**

Users are able to gain access to RegEd's annuities suitability courses designed to meet state training requirements. The user is able to order insurance CE credit(s) with the courses. NWL is automatically notified of annuity suitability courses completed on RegEd's platform. If you take a course with another vendor, you will need to provide a copy of your course completion to NWL.

			Home	Contact Us	About Us	Terms of Service
	RegEd					
MENU	Welcome John Smith					
	Producer Status	State Suitability Training				
	Enter Product Code	New state regulations require that producers complete annuities suitability courses prior to selling any annuity product. State-				
	State Suitability Training	mandated suitability courses completed on this site are:				
	Optional Insurance CE	Designed to meet state training requirements     Available for Insurance CE credit(s). Certification and state				
	My Certificates	fees may apply. <ul> <li>Reported to participating carriers on the RegEd/IRI Annuity</li> </ul>				
	My Account	Training Platform				
	FAQs	To access RegEd's <b>State Suitability Training</b> courses available to you please select the <b>Proceed</b> button below.				
	Forethought Annuity Product Training					
	Great-West Product Training	O Proceed				
	Nationwide Annuity Product Training					
	Sammons Retirement Solutions Product Training					

Select State Suitability Training from the left menu.

Select **Proceed** to continue to the My Courses page.



	Home	Contact Us	About Us	Terms of Service	Logout   (Logged in as John Smit
RegEd					🗘 Trax
My Courses					
Active Courses Course History					
Order Instructions:					
To order <i>new</i> courses or additional CE credits, please click CE credits available to you.	k the <b>Select</b>	New Co	urses and	CE Credit butt	on to view the courses and
To access a course that has already been ordered, please	select the o	correspon	ding Go To	Course button	below.
Before you take the exam, please check the pop-up block experience problems completing the exam.	er in your b	rowser ar	id ensure t	his website is al	lowed, otherwise you may
Select New Courses and CE Credit     O Order Add	ditional Insura	ance Credit			
Course Name State or Professional Designation CE Status		— Cour		Course C	ompletion Date
6					

#### A. Active Courses

Active Courses shows the courses the user has already ordered. If no courses have been ordered, this area will be blank.

#### **B.** Course History

The **My Courses** page allows the user to view their course history and access course completion certificates.

### C. Select New Courses and CE Credit Select this option to begin ordering a course(s).

### D. Order Additional Insurance Credit

Select this button to order additional CE credit for a course that has already been completed. Note that additional CE orders are subject to state regulations; some states do not allow CE to be ordered after a course has already been completed.

#### E. Courses Ordered

Courses already ordered or in progress are displayed here with an option on the right to Go To Course.

Click on Select New Courses and CE Credit to order state annuity suitability training courses.



RegEd					
Product Training & CE Options					
Do you want to receive CE credit(s), where available, with your Product Training completion(s)? <ul> <li>I want to receive CE credit(s) with my Product Training completion(s)</li> <li>I DO NOT want to receive CE credit(s) with my Product Training completion(s)</li> </ul> Warning! Ordering CE after the course is completed is NOT allowed for most states.					
O Proceed O Cancel					

Select whether you want to order CE with your course and then select Proceed.

The next page displays state specific CE information. Review the information, scroll to the bottom and select **Proceed**.

RegEd		Home   Contact	Us   About Us   Terms of Service		🗘 Tra
erify Information					
ease verify your order below.					
hen you have verified your order and info	ormation, select the <b>Complete Yo</b>	our Order button below.			
tem		Credits	Item Price		Remove Item
AIC Suitability in Annuity Transactions M nnuities State Suitability Approved In: A				\$0.00	Remove
Producer CE Credit for Louisiana	<u></u>	4.0 Annuities		\$0.00	O Remove
		ClearCert Annuities			
		Approved			
CE Credit for Alabama Alabama State Fee		4.0 General ClearCert		\$0.00 0.00	Remove
Alabama State Fee		Annuities		0.00	
		Approved			
			Grand Total:	\$0.00	
		* Denotes required field			
Provide State Required Informati		and its that you are ordering			
The following information is required to	property process the insurance CE	credits that you are ordering.			
* Social Security Number:	***-**-1111	o Edit			
* National Producer Number(NPN):	01010101	• Edit			
	License Type:				
* Louisiana License Number:	Producer	License Lookup			
* Alabama License Number:	Producer	License Lookup			
	✓ Report completions to Clear	rCert 🕜			
Desuide Email and Delivery Addre					
Provide Email and Delivery Addre					
Note: Email Address and Delivery Addre	iss is per your Profile Address				
		O Edit			
* Email Address:	john.smith@reged.com				
* Email Address: Delivery Address:	2100 Gateway Blvd	• Edit			
	2100 Gateway Blvd Morrisville NC 27560				



## NWL<sup>®</sup> Product Specific Training RegEd Instructions

CE credit will be ordered with the appropriate Annuity course for each state the user has entered on the Producer Page through Manage My State Suitability Requirements. Review and confirm the information on the page, then select Submit Your Order. The user is then required to enter credit card information to pay any applicable fees. The user can then complete the course order by selecting Submit Your Order on the bottom of the page. The user is returned to the My Courses page and the new course is available to begin via the Go To Course link.

# Administrative

### **My Certificates**

The My Certificates page lists any completed CE, the date completed and a link to download the certificate of completion.

#### **My Account**

The My Account page allows the user to update personal information saved in RegEd, such as login security questions, national producer number, business address and home address. This page also displays order history and allows the user to view receipts from past orders.