

Fidelity and Guaranty (F&G)

REQUIRED NY TRAINING INSTRUCTIONS

Effective, 8/1/2019 for Annuities and 2/1/2020 for Life, **New York Regulation 187** requires both resident and non-resident producers to be appropriately trained in suitability and to act in the best interest of a client's financial objectives. Completion of industry training, administered by a vendor, along with carrier specific product training are required prior to soliciting new business or servicing existing policies previously written in NY. Failure to complete these courses will result in declined business or rejection of servicing rights.

Proof of completion of the industry training must be provided to ECA Marketing. Email certificates to licensing@ecamarketing.com. If taken with LIMRA, a date of completion is required.

Industry Training Requirement

Not all vendors are universally accepted amongst the insurance carriers

Which vendors are accepted?

All vendors are accepted.

Carrier Specific Product Training Requirement

Training must be completed prior to the sale of both Life and Annuities

When can the product training be taken?

Product training can be completed anytime. Training and new business can be dated the same day.

Product Training Directions: Go to: <https://training.fglife.com/>

- **Existing agent:** use "Active Agent" login, New agent: use "Not Yet Active Agent" login
- Complete the registration
- Each product has its own course, select the product that is being sold
- Read the material carefully and then certify that the material was read and understood
- Be sure to select the Attestation Box