

Allstate Financial

Reg 187: Suitability and Best Interest of Clients in Life Insurance and Annuity Transactions Training Job Aid (Self-Assign)

Sign In:

1. GO TO: <https://secure.reged.com/TrainingPlatform/>. If the link does not work copy and past it in your web browser to access the RegEd Annuity Training Platform (ATP).
2. If you previously registered on the website, enter your User ID and password in the upper right-hand and select GO. If this is your first time to RegED's ATP website, select **Register Online** under the **Producer Get Started** section, which is just to the right of the US state map. Follow the instructions on the subsequent page.

Insured Retirement Institute

RegEd

Login Email Address: _____
Password: _____ **Go**
 Save User Name
[Forgot my password?](#)

TRAINING PLATFORM » **RULES AND REGULATIONS** **NEWS** **CONTACT US** **ABOUT US**

Holiday Close Notification
RegEd Customer Service will be available from 8:00 AM ET - 6:00 PM ET on Friday, May 24.
RegEd's offices will be closed on Monday, May 27 for Memorial Day. Normal business hours will resume at 8:00 AM ET on Tuesday, May 28.
All systems will remain operational and available.

Welcome to the industry's largest and most comprehensive annuities training platform. Log in now to experience our real-time reciprocity and requirements tracking engine and meet your training requirements today.

Participating Carriers

- Jackson National Life Insurance Company
- Jefferson National Life Insurance Company
- Liberty Life Assurance Company of Boston
- Lincoln National Life

Producers Get Started

1. [Register online](#) and create a profile.
2. Complete your state-mandated annuity training.
3. Complete Carrier-specific courses as they are assigned to you.

Other Available CE Courses

News

- RegEd Named Best Mid-Size Technology Company by the North Carolina Technology Association
- StoneRiver Risk and Compliance Acquires Compliance Assurance Corporation
- RegEd Receives Double Nomination for 2012 NCTA 21 Awards

US State Map

■ Adopted Requirement ■ Requirement Pending Adoption
■ No Requirements Pending Adoption

Download our FAQ here.

Producers: Contact us at info@reged.com
Carriers: Contact us at sales@reged.com

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2.1. To Complete the Registration Form: Make sure to click on the Find NPN search button to retrieve your national producer number and then type it into the box provided. Your NPN is **NOT** your SSN or state license number. You will also need to make sure to indicate **all** the states where you sell annuity products.



Self Registration

Login Information

The security questions / answers are required to help you reset your password, if you forget your password.

*Login Email: **Will be used as Login Name and Contact Email**

*Password: (Passwords must be at least 6 characters, and contain at least 2 alphabetic characters and 2 numbers)

*Verify Password:

*Security Question 1: Select Question ▼ *Answer:

*Security Question 2: Select Question ▼ *Answer:

*Security Question 3: Select Question ▼ *Answer:

(You must select 3 different questions and provide 3 different answers which do not match your password.)

Identifying Information

We require your Social Security Number and Date of Birth to process your CE as per state requirements.

Prefix:

*First Name: *Last Name: MI: Sfx:

*Social Security #: --

*Verify Social Security #: --

*Date of Birth: /▼/▼

*National Producer Number (NPN):

Business Address

*Address Line 1:

Address Line 2:

*City: *State: Select a state ▼ *Zip Code:

*Country: United States ▼

*Phone: Ext:

Fax:

Shipping Information

We require your shipping address to send you your certificates as per state requirements.

Same as Business Address I want to enter different Shipping Information

Home Information

Same as Business Address I want to enter different Home Information

Get Started:

3. After logging in or completing the registration process you will be directed to the **Producer Status** page. Look for "New York" under the "Annuities State Suitability Compliance Summary" section at the top of the page. Select **"Order Course"**.




- [Home](#)
- [Producer Status](#)
- [Enter Product Code](#)
- [State Suitability Training](#)
- [Optional Insurance CE](#)
- [My Certificates](#)
- [My Account](#)

Producer Status

Annuities State Suitability Compliance Summary

State	Resident?	Requirement Met? 	Course Status
New York	Yes	No see details below	Order Course

New York- RegEd offers two courses, 484_NY (5 hours) and 485_NY (1 hour), to fulfill the training requirement in Regulation 187. While both courses have been approved by NY DFS, it is the responsibility of the carrier to provide training. Please consult with your carrier to determine which course you should take.

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4. On the "Product Training & CE Options" page, select "I DO NOT want to receive Insurance and or Professional CE Credits". **PLEASE NOTE: CE credit is NOT required to satisfy the course requirement.**

IRI RegEd

1 Select Your License >> Choose Courses / CE Place Your Order

Insurance and/or Professional Designation CE Options

Do you want to receive Insurance and/or Professional Designation CE Credits?

I want to receive Insurance and/or Professional Designation CE Credits

I DO NOT want to receive Insurance and/or Professional Designation CE Credits

Warning! Ordering CE after the course is completed is NOT allowed for most states.

5. On the "Available Courses and CE Credits" page, search for Reg 187 and click the "Search" button. **Two courses will be displayed - You only need to select and complete one of the two available courses.**
 - o 484-NY - NY Reg 187: Suitability and Best Interest of Clients in Life Insurance and Annuity Transactions - 5 Hour Course
 - OR
 - o 485-NY - Best Interest of Clients in Life Insurance or Annuity Transactions: NY Reg 187 - 1 Hour Course

Select the course by clicking on the box just to the left of the course title, then click "Proceed".

Available Courses and CE Credit

To receive credit you must select **Add** for the credits desired. If no credits appear, the courses you have completed or ordered are not approved for that state or professional designation. To review your completed order, select **Proceed**.

Search Titles Within List

Please select a course approved in the category for which you seek credit. Ex. Ethics, Flood, General, L&H, P&C, Other.

Add Course	Credits	Price
<input type="checkbox"/> Best Interest of Clients in Life Insurance or Annuity Transactions: NY Reg 187-1 Hour Course (485_NY) <i>Annuities State Suitability Approved In: NY</i>	1	\$0.00
<input type="checkbox"/> NY Reg 187: Suitability and Best Interest of Clients in Life Insurance and Annuity Transactions (484_NY) <i>Annuities State Suitability Approved In: NY</i>	5	\$0.00

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6. On the "Enter Payment Information" page, confirm your course is listed. The price should be \$0.00. Click on "Submit Your Order".

Enter Payment Information

Please verify your order below. To add more courses or credits,

When you have verified your order, select the **Submit Your Order** button below.

Item	Credits	Item Price	Remove Item
Best Interest of Clients in Life Insurance or Annuity Transactions: NY Reg 187-1 Hour Course (485_NY)		\$0.00	Remove

Annuities State Suitability Approved In: NY

Grand Total: \$0.00


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Submit Your Order Cancel Your Order

7. You are now ready to proceed to the course. When you are ready, select "Go To Course".

My Courses

Active Courses Course History

Course Name	Course Status	Course Completion Date
State or Professional Designation CE Status Best Interest of Clients in Life Insurance or Annuity Transactions: NY Reg 187-1 Hour Course (485_NY)	Course Not Started	Go To Course

CONTACT INFORMATION:

- Questions regarding technical issue with RegEd's APT website or the website registration process may be directed to RegEd's Customer Service at 800-334-8322 or via e-mail at info@reged.com.