



How to Navigate the EquiTrust Product Training Center

The EquiTrust Product Training Center is designed to simplify the process required for you and EquiTrust to meet the guidelines proposed by the 2010 NAIC Annuity Transaction & Suitability Regulations adopted by many states. If you have already completed your training and submitted it to EquiTrust, you do not have to retake the training unless directed to do so by EquiTrust. Please review this quick reference guide for a successful launch into the EquiTrust Product Training Center.

1. Registration Process

On the Welcome Screen, you have the option to create an account and register as a new user or to enter the site as a returning user.

Create Account

You will be asked to enter your last name, last 4 digits of your SSN and date of birth and then click on [Create Account](#)

The system will do a check to ensure that you have not already registered. If no, you will be asked to provide the pertinent information required by SuccessCE to validate your relationship with EquiTrust. This is a secured site and only your last 4 digits of your social security number will be displayed after input. When you are done, simply click on [Save Account Information](#)

You will be asked to enter your state, state license number and renewal date and click on .

[Save License Information](#)

You may also cancel at this time by clicking on [Cancel](#)

2. Taking the Required Courses

EquiTrust and SuccessCE have done the work for you. Once you are successfully registered or login as a returning user, you will see the screen that displays the state and product information that applies to you:

- Required State and EquiTrust Annuity Courses
- Complete Your Courses
- Account/Personal Information
- New Continuing Education Requirements to Sell Annuities in Your State

There is no cost to you for the EquiTrust Product Training!

Required State Annuity Courses

Click on Required State Annuity Courses to display any courses that your state requires in addition to the EquiTrust product training presentations. You have the option to Purchase the Course or to check that you have taken the course elsewhere.

A. Taken Elsewhere

If you have taken your state required courses elsewhere, EquiTrust needs a certified record of this so you will be asked to provide the Course Title, State where course is approved, Course Number, Credit Hours and Completion Date. Click on Submit and you will be brought to the Take Your Courses screen.



If you have completed your course elsewhere, it is imperative that you fax your certificate to EquiTrust so we can issue your applications. **Please fax or email the Training Certificate to:**

(Fax) 816-221-9674

(Email) TemporaryEmailAddr@EquiTrust.com

B. Purchase Course

If you are ready to purchase the required course, simply click on

[Purchase Course](#)

C. Choose Your Package

Once you select Purchase Course, you will have the option to Select Unlimited Courses or to Select Only the Required Course. The price varies based on your selection. This is all driven by SuccessCE. Whichever option you select, you will be brought to the Shopping Cart to verify the cost of the training. If the order is correct, click on

[Continue to Finish Order](#)

Simply enter your credit card information and click on Complete Order. You will receive a confirmation of the purchase.

D. Take Your Course

Your purchased course(s) will display and you simply need to click on

[Open Course](#)

to begin your training.

- NAIC Suitability in Annuity Transactions Training

SuccessCE has a 4-hour NAIC Suitability in Annuity Transaction course that has been approved by 38 states as of June 2012.

- EquiTrust Product Training

Each annuity product offered by EquiTrust has a corresponding training guide. You will be happy to see that the product training is now in a more concise power point format. Each page is timed for 10 seconds to ensure that you have enough time to read the text; however you also have the ability to go back if you are not clear and the page allows you to move on to the next page.

Complete Your Courses

Once you have completed your courses, you may see them listed when you click on Complete Your Courses tab. A file will be generated and sent to EquiTrust each day where we will update our files indicating that you have completed your training.

Personal / Account Information

To edit your personal or account information, simply click on the Personal / Account Information tab.

New Continuing Education Requirements To Sell Annuities In Your State

You may always click on the New Continuing Education Requirements To Sell Annuities in Your State if you have any questions on current continuing education regulations. SuccessCE makes every effort to maintain up-to-date information.