

## QUEST CE

# Notice for training

- States that require fixed and income annuity training are: AK, AL, CA, CO, CT, DC, FL, GA, HI, ID, IL, IN, IA, KS, KY, LA, MA, MD, ME, MI, MN, MS, NE, NH, NJ, NY, ND, OH, OR, RI, SC, SD, TN, TX, UT, WA, WV, WI, WY.\*
- Fixed and income training is located under course title: "Fixed and Income Product-Specific Training (formerly Horizon Fixed Annuity series)."

## General NAIC student directions:

- NAIC login directions for individual users accessing carrier product-specific training and /or NAIC state annuity suitability training.
- Individuals will be taken through a three-step registration process if they are creating a new account.
- To register or log in, users should be directed to: <https://learn.questce.com/naicsuitability/>.

## For returning students (with an existing account)

1. On your internet browser, go to <https://learn.questce.com/naicsuitability/>.

\* Index training is required in ALL states

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Not a deposit | Not insured by any federal government agency | May lose value | No bank or credit union guarantee | Not FDIC/NCUA/NCUSIF insured

2. If you are returning to the site and have an existing account: Log in to your existing account with your **SSN and last name** (lowercase).
3. Personal Profile Security Setup (One-time requirement for all accounts).

**Personal Profile Security Setup**

To help us provide a secure environment for your information, please complete the security question setup below.  
 \* You must complete all 3 questions in order to proceed.  
 \* Each answer must contain 6 characters or more.

**Question 1:**  
 Select one question [dropdown]  
 [text input]

**Question 2:**  
 Select one question [dropdown]  
 [text input]

**Question 3:**  
 Select one question [dropdown]  
 [text input]

- Upon first login you will be prompted to create a secure profile by establishing three familiar security questions.
- Users who have already completed this secure account set-up process will simply gain access to their account and will not be prompted to create and answer their account security questions again.

4. Once logged in, you are able to start or continue any course previously added to your user dashboard.

Welcome MacKenzie nold

Please use the menu to the left to keep your profile up to date.

**Items To Be Completed**  
 Training You have 3 training items to be completed.

**NAIC Suitability Training (Product Specific)**

Status	Title	Content	Exam
Not Started	Carrier Sample Product Course Title 1	Start	🔒
Not Started	Carrier Sample Product Course Title 2	Start	🔒

**NAIC Suitability**

Status	Category	Title	Content	Exam
Not Started	Wisconsin NAIC Requirement	Wisconsin Annuity Training Course (NAIC)	Start	🔒

5. Add new Product-Specific training to your existing account.

- If you are looking to access a new product training course that is not already listed on your user dashboard (homepage), click **Add Product-Specific** from the menu options on the left. View the list of available product-specific training courses. Check the box to select and add a product-specific training course to your student dashboard.

6. **Please Note:** If you click the **Add Product-Specific** tab and do not see the product training course you're looking for, you may need to return to your student dashboard page to verify your carrier(s) and broker dealer are properly selected in your account.
  - First, ensure you have the appropriate carrier(s) added to your account through the **Manage Appointments** tab on the side menu.
  - Also, verify that you have the appropriate broker dealer selected within your account settings through the **Broker Dealer** tab.
  - If you have the appropriate carrier(s) and broker dealer setting in your account, the proper product training courses will be available to you to select within the **Add Product-Specific** tab.
7. Once a course is added to your student dashboard page (homepage), click **Start** to access and work through the content portion of the course.
8. Once you have proceeded through all of the course content slides, click **Begin** (located under Exam) to open the course attestation or multiple choice exam.
9. Click **Start Exam** to answer a one-question attestation or multiple choice exam to mark the course fully Complete.
  - Your carrier(s) will be notified of any respective course completion(s) once the course status is 'Complete'.

## Directions for new students: Registering/Creating a new account

1. On your internet browser, go to <https://learn.questce.com/naicsuitability/>.

**QUEST CE** THE NEXT GENERATION OF COMPLIANCE TRAINING SOLUTIONS

**Producer Login**  
 Social Security Number:   
 Last Name: (lower case)   
 Sign In

**Register**  
 State Regulations  
 Support

**GET STARTED IN 3 STEPS**  
 1. Login or Register  
 2. Add your State Training  
 3. Select your Broker Dealer and assign your carrier / product courses

**Participating Private Carriers**  
 Follow Link Below  
 B.C. Ziegler & Company  
 COUNTRY Financial  
 Indiana Farm Bureau Life Insurance  
 Modern Woodmen of America

**Welcome to Quest CE's NAIC Annuity Training Portal**  
 Quest CE simplifies the NAIC's Annuity Training requirements for producers, insurance carriers and broker-dealers with our premier NAIC annuity suitability training solution, featuring the industry's first real-time reciprocity engine. Developed in late 2010, Quest CE's NAIC training provides access to state specific courses and carrier's product specific courses as they become approved. [Click Here to learn more about NAIC Annuity Training.](#)

**The Power of Reciprocity**  
 Quest CE's proprietary reciprocity functionality is standard in all NAIC solutions, providing users with the ability to complete one course for state credit and receive credits for the additional states that share reciprocity. The reciprocity functionality allows producers and insurance license holders to fulfill multi-requirements in a single training session. Quest CE proudly became the first vendor to provide this real-time service to the industry on March 21, 2011.

**Regulations by State**  
 Please see the map below for a snapshot of pending or adopted regulations. To see a full list, please click [here](#).

Legend:  
 No Regulation (light gray)   Pending Regulation (light red)   NAIC Adopted Regulation (dark red)   State Specific Training (dark brown)

**Participating Global Carriers**  
 Login or Register  
 American General Life Insurance Company  
 Ameriprise Financial  
 The Aycos Company  
 First SunAmerica Life Insurance Company  
 Hartford Fire Insurance Company  
 Lincoln Financial  
 Massachusetts Mutual  
 MetLife  
 National Western Life Insurance Company  
 New York Life Insurance Company  
 Pacific Life Insurance Company  
 Protective Insurance Services  
 Prudential  
 RiverSource Life Insurance Company  
 SunAmerica Annuity and Life Assurance Company  
 The Variable Annuity Life Insurance Company

2. Click **Register** to create your account.
3. Enter your information into the required fields to create your account. Click **Register** to proceed.
  - **Note:** If the NPN and CRD fields are not applicable to you, you can enter a 0 to proceed.

### NAIC Suitability Training Registration

\* Complete all required fields to create your account

#### Personal Information

**Name of your Business / Company\***

**First Name\***  **Last Name\***   
\* Must be lower case

**Email\***  **Phone**




#### Identification

**Social Security Number\***

**National Producer Number\***  
  
[\\* Click here to lookup your NPN](#)

**CRD Number\***  
   
[Click here to lookup your CRD Number](#)  
If you do not have a CRD Number please enter '000'

4. You will be taken through a three-step registration process in order to select and begin your proper training. Click **Continue to Step 1**.



**Welcome Sam Jones**

Please read the registration instructions below.

**NAIC Suitability Training**

You will be taken through a 3 step process in order to begin your training.

1. Pick your **State Specific** NAIC Suitability Training
2. Pick the carriers you are **appointed** with
3. Pick your **Product Specific** Training

**Helpful Tip:**  
You must proceed through all three steps of the registration process to successfully access your training account dashboard and begin completing courses. In the future, you will be able to simply login to your existing account to access your training immediately.

[Continue to Step 1](#)

**5. Registration Step 1: State-specific NAIC Annuity Suitability Training**

- Follow the directions on the next page to help you select your State-specific NAIC Annuity Suitability Training.

**Step 1: Pick your State Specific NAIC Annuity Training**

Insurance CE Credit  
I need to satisfy the NAIC requirement in my state of licensure and earn insurance CE credit for this completion. (\* additional fees will apply). CE Credit

NAIC Requirement Only (No insurance CE credit)  
I only need to satisfy the NAIC requirement in my state of licensure and do not need CE credit for this completion. NAIC Requirement

Skip Step 1  
Bypass State Annuity Training Selection Skip Step 1

- **Note:** If you are only looking to take product-specific training (No State Annuity Training), select **Skip Step 1**, bypassing the State Annuity Course selection at this time.

**Step 1 - Pick your state-specific NAIC Suitability Training**

Please choose the State in which you'd like to view courses:

Please choose... View Courses Available

*\* Just pick 1 state to begin and you can add more later if needed.*

I have already fulfilled my state NAIC requirement or would like to proceed to select product training.

NOTE: You may access the NAIC State Specific Training course at anytime.

Skip Step 1

**6. Registration Step 2: Select your broker dealer, BGA or independent firm name from the drop-down list.**

- Select the carrier(s) you are appointed with from the list below.
- Click **Continue** to proceed.

**Step 2 - Select your Broker Dealer/ BGA/ Independent Firm from the drop down list. Then select the Carrier(s) you are appointed with from the list below:**

Broker Dealer  
Please choose...

Carriers:

<input type="checkbox"/> AIG Annuities	<input type="checkbox"/> New York Life Insurance Company
<input type="checkbox"/> Catholic Order of Foresters	<input type="checkbox"/> Pacific Life Insurance Company
<input type="checkbox"/> Commonwealth Annuity and Life Insurance Company	<input type="checkbox"/> Pacific Life Insurance Company of New York
<input type="checkbox"/> Genworth Life and Annuity Insurance Company	<input type="checkbox"/> Protective Life Insurance Company
<input type="checkbox"/> John Hancock	<input type="checkbox"/> Prudential Annuities
<input type="checkbox"/> Lincoln Financial Group	<input type="checkbox"/> RiverSource
<input type="checkbox"/> Massachusetts Mutual Life Insurance Company	<input type="checkbox"/> The Hartford
<input type="checkbox"/> Metropolitan Life Insurance Company	<input type="checkbox"/> Transamerica Life Insurance Company
<input type="checkbox"/> National Western Life Insurance Company	

Continue

**7. Registration Step 3: Select your appropriate product-specific training courses.**

- Check the boxes for the product courses you wish to add to your account.
- Click **Select Courses** to proceed to your student dashboard page (homepage).

(Sample view below — courses listed will vary based on the Broker Dealer selected previously.)

**Q**

**Step 3 - Pick your Product Specific Training:**

Please choose the product specific training courses you'd like added to your profile:

**Carrier Sample Product Course Title 1**  
**Description:** The following course covers *Sample Carrier's Annuity Products*  
*NOTE: This course is not eligible for state or designation continuing education credits.*

**Carrier Sample Product Course Title 2**  
**Description:** The following course covers *Sample Carrier's Annuity Products*  
*NOTE: This course is not eligible for state or designation continuing education credits.*

**Carrier Sample Product Course Title 3**  
**Description:** The following course covers *Sample Carrier's Annuity Products*  
*NOTE: This course is not eligible for state or designation continuing education credits.*

**Continue**

**8. Personal Profile Security Setup (One-time requirement for all user accounts).**

- Upon first login you will be prompted to create a secure profile by establishing three familiar security questions.
- Users who have already completed this secure account set-up process, will simply gain access to their account and will not be prompted to create and answer their account security questions again.

✳ Password — ✉ Email Address — 🔒 Security Questions

**Personal Profile Security Setup**

To help us provide a secure environment for your information, please complete the security question setup below.  
 \* You must complete all 3 questions in order to proceed.  
 \* Each answer must contain 6 characters or more.

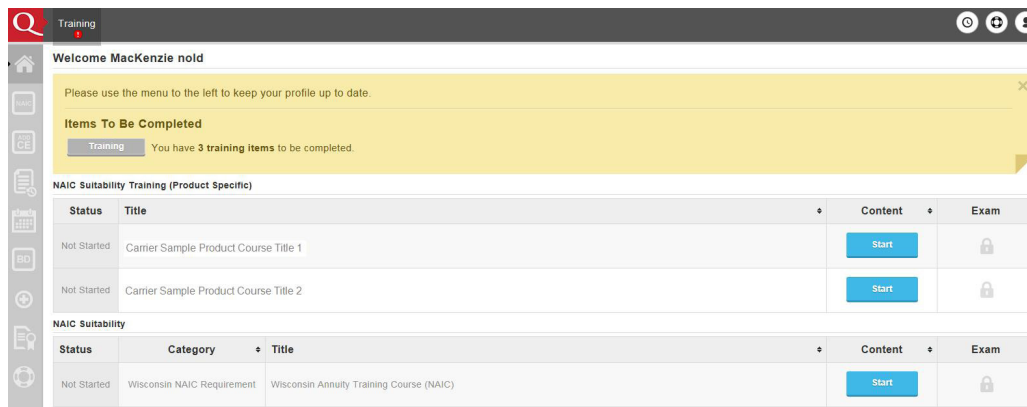
**Question 1:**  
 Select one question ▼

**Question 2:**  
 Select one question ▼

**Question 3:**  
 Select one question ▼



9. After the profile security questions you will land on your account dashboard page. The product-specific training course(s) you have selected, as well as any state annuity training course selected within the registration process, will be available for you to start and complete.
10. Click **Start** to access and work through the content portion of each course.



11. Once you have read and navigated through all content slides for a particular course, click **Begin** (located under Exam) to open the course attestation or exam. (Exams remain locked until you complete the content portion of a course first.)
12. Click **Start Exam** to answer a one-question attestation or multiple choice exam to mark the course fully Complete.

**Please Note:**

- You will not need to register fully the next time you access your NAIC-training account. You will be able to simply log in to your existing account which you created.
- Your carrier(s) will be notified of any respective course completion(s) once the course status is **'Complete'**.

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