

# ANNUITY TRAINING REQUIREMENTS

## Guaranty Income Life Insurance Company

Continue below to view GILICO's contract checklist, as well as details on GILICO product education.

In addition to these carrier product training requirements, please be sure that you are compliant with all state training requirements prior to taking applications in states that require National Association of Insurance Commissioners (NAIC) and/or Best Interest compliance.

**Note:** states requiring annuity suitability training also require company specific product training prior to solicitation of an annuity. Read on for details on where to locate product training presentations and quizzes.

Items 1-8 must be returned to GILICO.

1. Application for Appointment To Represent – Form GIA 136 (Rev 1/10). Note that the Producer and the Marketing Organization must sign the application.
2. Consumer Credit Reporting Disclosure – Form GCCR-D (1/12)
3. Consumer Credit Reporting Authorization – Form GCCR-A (1/12)
4. Authorization for Automatic Commission Deposits – Form GI 508 (10/99). Please attach a "VOID" check for the account to which automatic deposits are to be made.
5. Agent's Contract – GI 129 (Rev 4/99)
6. Copy of Producer License. LTC License requirements – Life and Health or Disability; North Carolina also requires a Med/Supp License
7. Copies of LTC and/or Annuity Suitability Education Certificates of Completion. (If applicable, original and most recent follow-up training certificates)
  1. **Annuity Suitability**– See the "State Annuity Suitability Training Requirement List" at [www.GILICOLink.com](http://www.GILICOLink.com) (User Id – download / Password – prq891) for your state's training requirements. Must be done prior to solicitation.
  2. **LTC Continuing Education**– See "State Long-Term Care Appointment Requirements" at [www.GILICOLink.com](http://www.GILICOLink.com) (User Id – download / Password – prq891) for your state's license and training requirements. You must have the correct license and training prior to solicitation.
  3. **GILICO Product Education** – States requiring annuity suitability training also require company specific product training prior to solicitation of an annuity. The product training presentations and quizzes can be found on [www.GILICOLink.com](http://www.GILICOLink.com) (User Id – download / Password – prq891). GILICO tracks completion of this education so certificate copies need not be submitted. Note: you must complete AnnuiCare and FlexPlus training before soliciting AnnuiCare 10, 7, or 5. You must complete AnnuiCare and Guaranty training before soliciting AnnuiCare 8, 6, or 4.
8. Request for Taxpayer Identification Number and Certification – Form W-9
9. Agent's Guide Rules and Procedures & Anti-Money Laundering Producer Guide – (4/28/06). Note: do not return. These should be kept by the producer.