


ANNUITY TRAINING REQUIREMENTS

Integrity


Integrity's online training instructions are provided below. 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: the four-hour CE state courses can be accessed on www.kfeducation.com/portal, from the 'Portal Tools' tab on the homepage of the Kaplan site, select 'Enroll in Courses', under 'CE Insurance' select the appropriate state, then select 'Annuities' to order the required, state specific, Regulation 275 Annuity course.

Follow the steps below to ensure compliance with Integrity's requirements and avoid delays:

 **Product Training** – If you have any questions about product specific training, please contact Integrity/National Integrity at 1-800-804- 4465 option 4, and then option 3. Alternatively, if it is a technical issue, please contact the site provider Kaplan at 1-800-824-8742.

- Link to Complete Training: <https://portal.kaplanfinancial.com/partner/WSFG/>
 - You will need to log in to the website. If you are new to the website, you will need to register first.
 - After you've logged in, look for Product Training in the middle of the screen, select Enroll Now>>.
- You will need to add the required training to your courses on Kaplan.
 - Select Course Titled "Integrity/National Integrity (Fixed, SPIA, DIA, & Index) February 2021"
 - Select "Add 1 Course(s) to Cart"
 - Select "Place Order"
 - Select "Portal Home"
 - Select "Access Your Courses"
 - Select "Integrity/National Integrity (Fixed, SPIA, DIA, & Index) February 2021"
 - Enter your "Social Security Number" as required
 - Select "Start Course"

 **Completion Records** - When you are done you will "Attest" that the training is complete and understood. At the top right click the green "Dashboard" icon and then click "View Certificate."