ANNUITY TRAINING REQUIREMENTS

Lincoln Financial

Lincoln Financial's 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.

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

Product Training - go to https://naic.pinpointglobal.com/LincolnFinancial/apps/ to complete necessary training.

LIMRA
- Returning Users - Enter your Username & Password
- New Users – Select the "Click here to register" button to create an account
- The first page after you log in contains a summary of your state and product training requirements. From this page click on "My State Specific Training" on the left menu or on "View My State Specific Training" at the bottom of the page in the My Training Status section.
  - The My State Specific Training page contains the "National Underwriter CE Course" and allows you to take the course and exam or to upload a certificate of completion if you have already completed the training

Kaplan
- If you have not yet completed your state required annuity training, you will need to do so on Kaplan. Click the following link to view details on how to complete the Kaplan training (starting on pg. 11 of the PDF): https://cavalierassociates.com/wp-content/uploads/Accessing-LIMRA-Kaplan-Training-Site_2020.pdf

Product-Specific Training
- Once you have completed state training on either Kaplan or uploaded a certificate, you will see a completion date populated on the state training page. You are now ready to complete Lincoln's product training. Click on "My Product Training" on the left menu
- Click on the training for the products you are interested in. After you complete the course, you will be able to take additional product courses. The course will open in a new window. Click the gray arrow (bottom right) to advance to the next slide.
- At the end of the course click "I Agree" to attest that you understand the material.
- The final slide provides instructions on exiting the course. Close the tab and return to the LIMRA My Training page. Once refreshing your page, you will see completion checkmarks & completion date.
- Take additional product courses as needed by repeating these steps.

Completion Records – for LIMRA: If you have previously completed your state annuity training, click "Click here to access training" under "Import Certificate of Completion". Enter needed information, attach your certificate of completion, attest that you have completed the course, & click submit.

- For Kaplan: Skip this step if state training was completed on Kaplan. Kaplan completions automatically feed to LIMRA and Lincoln Financial.