

# ANNUITY TRAINING REQUIREMENTS

Pacific Life

Pacific Life'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.

Note: Financial Professionals (FP) can now complete Pacific Life product training at [www.annuities.pacificlife.com](http://www.annuities.pacificlife.com). You must be appointed with Pacific Life and registered on our website

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



**Product Training** - go to <http://www.annuities.pacificlife.com> to complete necessary training.

- Note: you must be appointed with Pacific Life & registered on our website.
- Once logged in, click on the "NAIC Product Training" link on the dashboard.
- When you get to the NAIC training screen, you will see the current training modules and it will say View Training if they haven't been completed. There are 3 different modules, one for variable annuities, one for standard fixed annuities and one for fixed index annuities. To view any of the trainings, click on View Training
- This will open the PDF training module in a separate window. Once you have completed the module, you will need to close the PDF.
- After the PDF has been closed, you will see a button to Acknowledge that you completed the training. Click on this button to complete the training.



**Completion Records** - After you have completed the module(s), if you click on Certificate of Completion, it will bring up a certificate that you can save or print. This section will also show when you have completed the module(s) and this status will feed directly into the Pacific Life licensing system in real time.