

NAIC Annuity Training

In order to sell annuity products, you may be required to take training.

1) Log in to State Life Training Portal

- a. Username is your NPN #
- b. Password is your last name (all lowercase) plus the last 4 digits of your NPN #

<https://naic.pinpointglobal.com/OneAmerica/Apps/default.aspx>



ONEAMERICA®

First time visitors
[Click here to register](#)

Returning users
Username:

Password:

[Log In](#)

[Forgot credentials?](#)

Your username will be your NPN#. [Click here to retrieve your NPN#](#)

Your password will be your last name (all lowercase) plus the last 4 digits of your NPN#. ex: John Smith with an NPN of 12345678 will have an initial password of smith5678.

Passwords can be changed upon access to the site.

Annuity Training and Certification

The companies of OneAmerica are providing its agents with a practical solution to meet requirements through this website.

Welcome to the OneAmerica companies' Annuity Training Program

This site provides you the opportunity to satisfy the training requirements necessary to sell OneAmerica products in compliance with state regulation. Through this site we offer both annuity product specific and credit hour general annuity training course (available at your expense). The companies of OneAmerica are completed prior to accepting any annuity business.

Why is Annuity Training Required?

In March 2010, the National Association of Insurance Commissioners (NAIC) adopted an amended Suitability Model Regulation (formerly the Consumer Protection in Annuity Transactions Model Regulation or the Suitability Transactions Model Regulation). The amended model regulation updates and revises previously established procedures for suitable individual annuity recommendations to help ensure that consumers' insurance interests are appropriately considered and protected. The definition of "Suitability Information" was expanded and requires a reasonable basis to determine that the recommendation to purchase, exchange or replace an annuity is appropriate, modify previously established methods to supervise recommendations. Perhaps one of the most significant changes to the model regulation was the addition of training and education requirements for the sale of annuities. This includes product-specific training which explains all material features of an insurer's annuity products AND a general annuity training/certification course PRIOR to the solicitation or sale of an annuity product.

Several states have adopted or proposed language from the 2010 Suitability in Annuity Transactions Model Regulation with state variations and existing state annuity training requirements that may require additional training and your state(s) specific laws or regulations.

State Specific Training

If your state requires producers to complete a one-time four hour annuity training course offered via Continuing Education vendors, you can attach the completion certificate to the training portal.

- 1) Select *View My State Specific Training* to attach 4 hour annuity CE certificate for annuity course previously completed



- a. Select Launch



- b. Complete fields regarding course found on completion certificate

Certificate Upload
Please browse your local file system for a certificate to upload.
You must also choose an approved CE vendor from the list below.

Valid file extensions are:

- Image GIF (.gif)
- Image JPG (.jpg)
- PDF (.pdf)

Certificate Date:
Must be in mm/dd/yyyy format.

Course ID:

Certification Training Provider:

State:

Credit Hours:

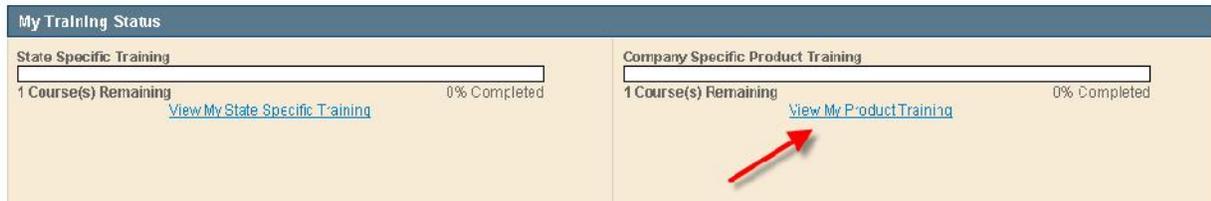
Valid file extensions are: PDF(.pdf), GIF(.gif), JPG(.jpg)

I attest that I have completed the CE course indicated and I am uploading a valid certificate.

1. Certificate Date
2. Course ID
3. Vendor
4. State
5. Credit Hours
6. Select Browse to select certificate saved on your PC
7. Select Submit

State Life Product Training

1) To complete the Sate Life product training select *View My Product Training* from Home page



The screenshot shows a 'My Training Status' section with two columns. The left column is titled 'State Specific Training' and shows '1 Course(s) Remaining' and '0% Completed' with a link 'View My State Specific Training'. The right column is titled 'Company Specific Product Training' and shows '1 Course(s) Remaining' and '0% Completed' with a link 'View My Product Training'. A red arrow points to the 'View My Product Training' link.

2) Select Launch.- Course will open in a separate window



The screenshot shows the OneAmerica website's 'My Training' page. On the left is a blue navigation menu with links: Home, My State Specific Training, My Product Training, and My Transcript. The main content area has a 'Welcome' message, a photo of three people, and a 'My Training' section with a 'Refresh' button. Below this is a blue bar for 'OneAmerica Product Specific Training'. Underneath, there is a checkbox for 'Care Solutions' with a link '(click to expand or collapse)'. Below that is another checkbox for 'Care Solutions Training (12SLCS2)' with a 'Launch' link. A red arrow points to the 'Launch' link.