



ANNUITIES

# Lincoln Individual Annuities

## *Guide for Accessing Lincoln Fixed and Variable Annuity Training*

### RegEd Training Site

Product and features subject to state availability and firm approvals.  
Certain features may not be available at all times or on all products.  
State variations apply.

Refer to Product Disclosure Statements, Rate Sheets, Client Guide and  
Fact Sheet for more information.

September 2020

Products issued by:  
The Lincoln National Life Insurance Company  
Lincoln Life & Annuity Company of New York

# Producer Training Requirement for Individual Fixed and Variable Annuities

- The NAIC Suitability Model Regulation requires producers to complete four hours of general annuity training and ongoing product-specific training prior to submitting business .
- RegEd is the vendor your affiliated firm uses to provide Lincoln's product-specific training in accordance with the NAIC Annuity Suitability Model Regulation.
- Producers have the option to complete the general training on the site or upload a certificate of completion from another CE vendor
- The following pages provide information on accessing Lincoln's Annuity Training on RegED. To access the training site go to:  
<https://secure.reged.com/TrainingPlatform/>

# Begin registration

**IRI** Insured Retirement Institute

**RegEd**

Login Email Address: \_\_\_\_\_  
Password: \_\_\_\_\_ **Go**  
 Save User Name  
[Forgot my password?](#)

**TRAINING PLATFORM >>**    **RULES AND REGULATIONS**    **NEWS**    **CONTACT US**    **ABOUT US**

*Welcome to the industry's largest and most comprehensive annuities training platform. Log in now to experience our real-time reciprocity and requirements tracking engine and meet your training requirements today.*

**Participating Carriers**

- EquiTrust Life Insurance Company
- Everence
- Forethought Life Insurance Company, A Global Atlantic Company
- Guaranty Income Life Insurance Company
- Jackson National Life Insurance Company
- Jefferson National Life Insurance Company
- Liberty Life Assurance Company of Boston

**Producers Get Started**

1. [Register online](#) and create a profile.
2. Complete your state-mandated annuity training.
3. Complete Carrier-specific courses as they are assigned to you.

**Other Available CE Courses**

**News**

- RegEd Announces COVID-19 Resource Center
- RegEd Announces Expansion of Enterprise Compliance Platform with Gifts, Gratuities and Contributions Management
- RegEd Hosts Virtual CCO Roundtable on Compliance Challenges During COVID-19

**Map Legend:**

- Adopted Requirement
- Requirement Pending Adoption
- No Requirements Pending Adoption

**Download our FAQ here.**

Producers: Contact us at [info@reged.com](mailto:info@reged.com)  
Carriers: Contact us at [sales@reged.com](mailto:sales@reged.com)

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**Click the "Register Online" link shown on the right side.**

# Personal information

## Self Registration

### Login Information

The security questions / answers are required to help you reset your password, if you forget your password.

|                       |  |  |           |
|-----------------------|--|--|-----------|
| *Login Email:         | bruce_wayne@lfg.com                            | <b>Will be used as Login Name and Contact Email</b><br>(Passwords must be at least 6 characters, and contain at least 2 alphabetic characters and 2 numbers) |           |
| *Password:            | *****  |  |           |
| *Verify Password:     | *****  |  |           |
| *Security Question 1: | In what city or town was your first job?       | *Answer:   | Gotham    |
| *Security Question 2: | What was the make and model of your first car? | *Answer:   | Balmobile |
| *Security Question 3: | What was your childhood nickname?              | *Answer:   | Balman    |

(You must select 3 different questions and provide 3 different answers which do not match your password.)

### Identifying Information

We require your Social Security Number and Date of Birth to process your CE as per state requirements.

|                                  |                 |   |       |     |  |
|----------------------------------|-----------------|---|-------|-----|--|
| Prefix:                          | Mr.             |   |       |     |  |
| *First Name:                     | Bruce           | *Last Name:                             | Wayne | MI: |  |
| *Social Security #:              | 123 - 45 - 6789 |   |       |     |  |
| *Verify Social Security #:       | 123 - 45 - 6789 |   |       |     |  |
| *Date of Birth:                  | 01 - 02 - 1983  |   |       |     |  |
| *National Producer Number (NPN): |                 | <input type="button" value="Find NPN"/> |       |     |  |

### Business Address

|                  |               |         |          |             |       |
|------------------|---------------|---------|----------|-------------|-------|
| *Address Line 1: | 1 Wayne Manor |         |          |             |       |
| Address Line 2:  |               |         |          |             |       |
| *City:           | Gotham City   | *State: | Illinois | * Zip Code: | 60690 |
| *Country:        | United States |         |          |             |       |
| *Phone:          |               | Ext:    |          |             |       |
| Fax:             |               |         |          |             |       |

Complete required information on the Self Registration screen.  
Mandatory information is marked by a red asterisk.

### Shipping Information

We require your shipping address to send you your certificates as per state requirements.

Same as Business Address  I want to enter different Shipping Information

### Home Information

Same as Business Address  I want to enter different Home Information

### Terms of Service

I accept the [Terms of Service](#) and site usage requirements

\* Denotes required field



# Terms of service

## Shipping Information

We require your shipping address to send you your certificates as per state requirements.

Same as Business Address  I want to enter different Shipping Information

## Home Information

Same as Business Address  I want to enter different Home Information

## Terms of Service

I accept the [Terms of Service](#) and site usage requirements

\* Denotes required field



You must check the box accepting Terms of Service, then click "Register."

# State registration

## Current Insurance Licenses

**Manage Insurance Licenses**

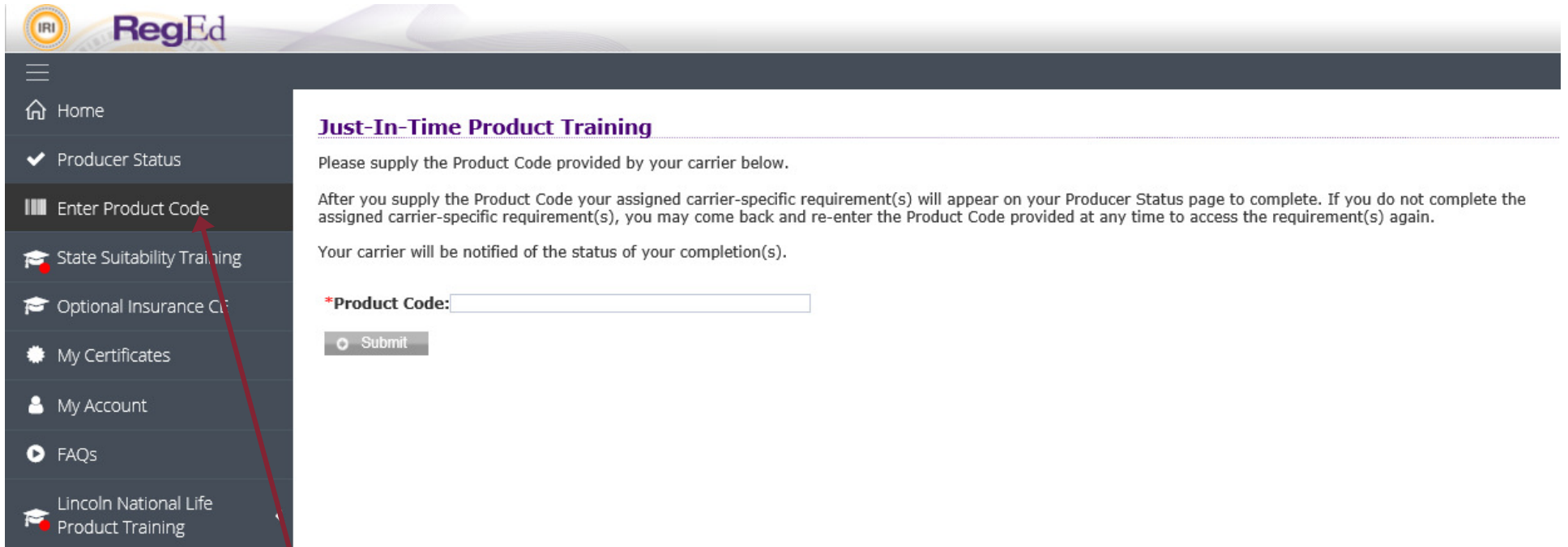
*Please enter your insurance license information:*

| Delete | State          | Resident                 | Annuities Sold                      |
|--------|----------------|--------------------------|-------------------------------------|
| X      | Select a State | <input type="checkbox"/> | <input type="checkbox"/> Select All |

Once your states have been indicated, select **Save** to continue.

Select the state(s) where you plan to sell annuity products by using the "Select a State dropdown box", then click "Save".


# Enter product code



The screenshot shows the RegEd website interface. The top navigation bar includes the IRI logo and the RegEd logo. A dark sidebar on the left contains a menu with the following items: Home, Producer Status, Enter Product Code (highlighted with a red arrow), State Suitability Training, Optional Insurance Coverage, My Certificates, My Account, FAQs, and Lincoln National Life Product Training. The main content area is titled "Just-In-Time Product Training" and contains the following text: "Please supply the Product Code provided by your carrier below." "After you supply the Product Code your assigned carrier-specific requirement(s) will appear on your Producer Status page to complete. If you do not complete the assigned carrier-specific requirement(s), you may come back and re-enter the Product Code provided at any time to access the requirement(s) again." "Your carrier will be notified of the status of your completion(s)." Below the text is a form with a label "\*Product Code:" followed by a text input field and a "Submit" button.

Click on the “\*enter product code symbol\*” to navigate to the Product Code page.

# Enter product code



- Home
- Producer Status
- Enter Product Code**
- State Suitability Training
- Optional Insurance CE
- My Certificates
- My Account
- FAQs
- Lincoln National Life Product Training

## Just-In-Time Product Training

Please supply the Product Code provided by your carrier below.

After you supply the Product Code your assigned carrier-specific requirement(s) will appear on your Producer Status page to complete. If you do not complete the assigned carrier-specific requirement(s), you may come back and re-enter the Product Code provided at any time to access the requirement(s) again.

Your carrier will be notified of the status of your completion(s).

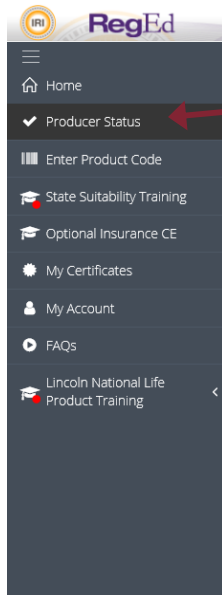
\*Product Code:

Enter the product code, then click "Submit" to add all Lincoln Financial Group's product training to your available courses.

| Firm            | Product Code |
|-----------------|--------------|
| Most firms      | Lincoln      |
| Merrill Lynch   | LincolnML    |
| Morgan Stanley  | LFGMSSB      |
| Allstate        | AllstateLFG  |
| Impact Partners | ImpactLFG    |
| TD Ameritrade   | LincolnTDA   |
| Valmark         | ValmarkLFG   |
| PNC             | LincolnPNC   |



# State and Carrier specific training



To view carrier-specific requirements that have been assigned to you, click on "✓" on the left hand side.

## Producer Status



### Annuities State Suitability Compliance Summary

| State     | Resident? | Requirement Met? | Product Type | Course Status |
|-----------|-----------|------------------|--------------|---------------|
| Tennessee | Yes       | No               | All          | Order Course  |

Manage My State Suitability Requirements

### Best Interest State Training

The following states do not have Best Interest Requirements in place: Tennessee

Manage Best Interest Requirements

### Add Product Code

Enter a Product Code to receive access to company-specific training. Product Codes are sometimes referred to as JIT codes

Product Code:  Submit

As shown, you will be able to see and select any state specific trainings assigned, along with carrier specific trainings.

Although RegEd, Inc. takes reasonable steps to ensure that the information displayed through the Annuities Training Platform is current and correct based on the data provided to it, it neither warrants nor guarantees its accuracy or timeliness. Producers should verify their product training and continuing education requirements and status on the websites of the state departments of insurance where they hold licenses and with their carriers, as appropriate.

| Requirement  | Completion Date | Requirement Status |
|--|-----------------|--------------------|
| <b>Lincoln National Life Product Training</b><br>Lincoln National Life Variable Annuity Training September 2019 (19LNL_14) |                 | Go To Requirement  |

# QUESTIONS?

LINCOLN'S LICENSING CALL CENTER: 1-800-238-6265, OPTION 1

OR [LICENSINGSTATUS@LFG.COM](mailto:LICENSINGSTATUS@LFG.COM)



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Contracts sold in New York are issued by Lincoln Life & Annuity Company of New York, Syracuse, NY.

**Contractual obligations are subject to the claims-paying ability of the issuing insurance company.**

**Variable annuities are sold by prospectus; the prospectus contains investment objectives, risks, charges and expenses of the variable product and its underlying investment options. Read carefully.**

|   |                  |  |
|---|------------------|--|
| Not a deposit                                     | Not FDIC-insured | Not insured by any federal government agency |
| Not guaranteed by any bank or savings association |                  | May go down in value                         |



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