Guide to Accessing Lincoln Fixed and Variable Annuity Training

LIMRA Training Site

You're In Charge℠

Producer Training Requirement for Fixed and Variable Individual 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 .
- Lincoln has chosen LIMRA as the vendor to provide Lincoln's product-specific training for most distribution partners 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. To access LIMRA's training site go to:

http://naic.pinpointglobal.com/LincolnFinancial/Apps/default.aspx

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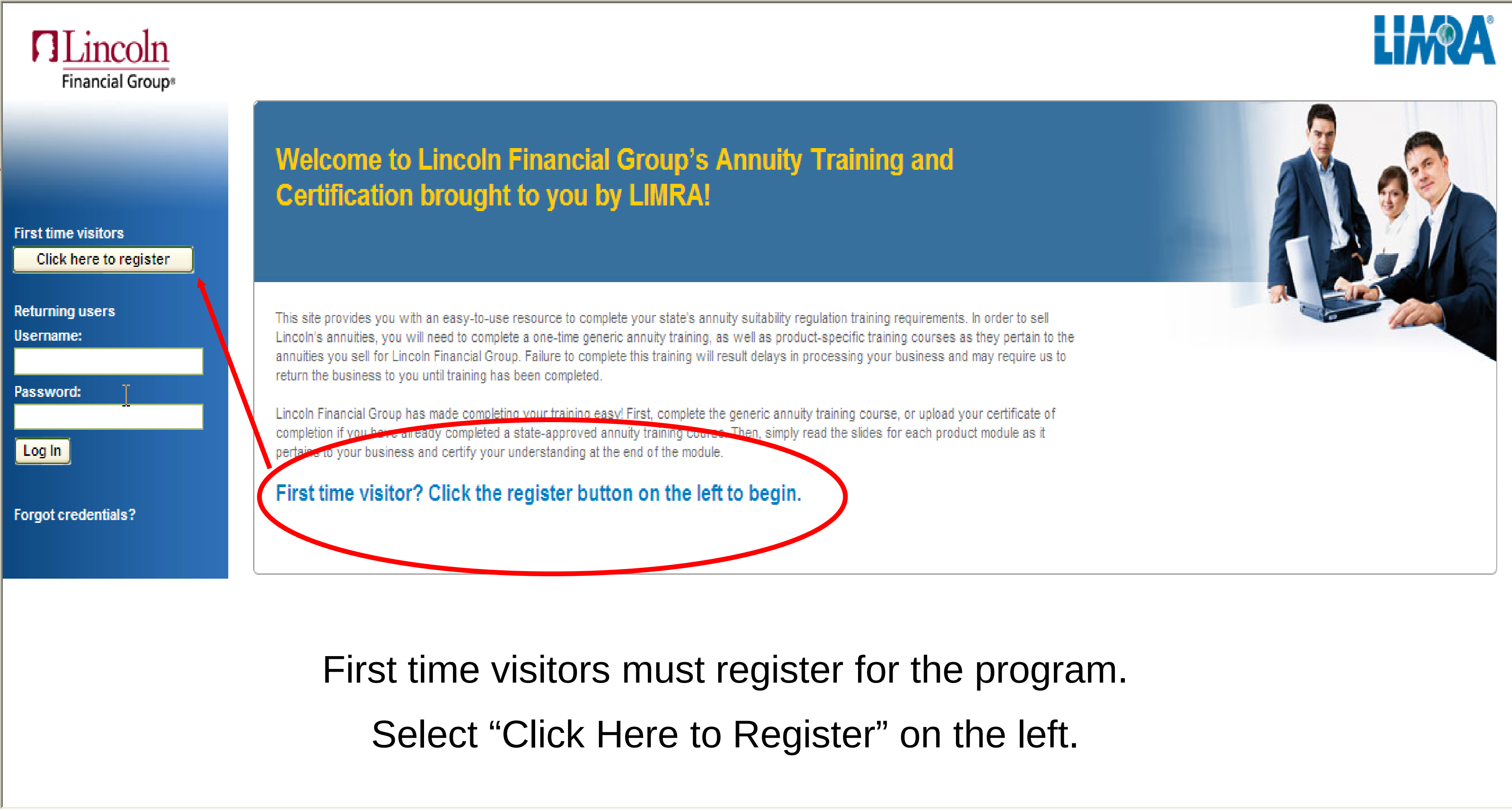
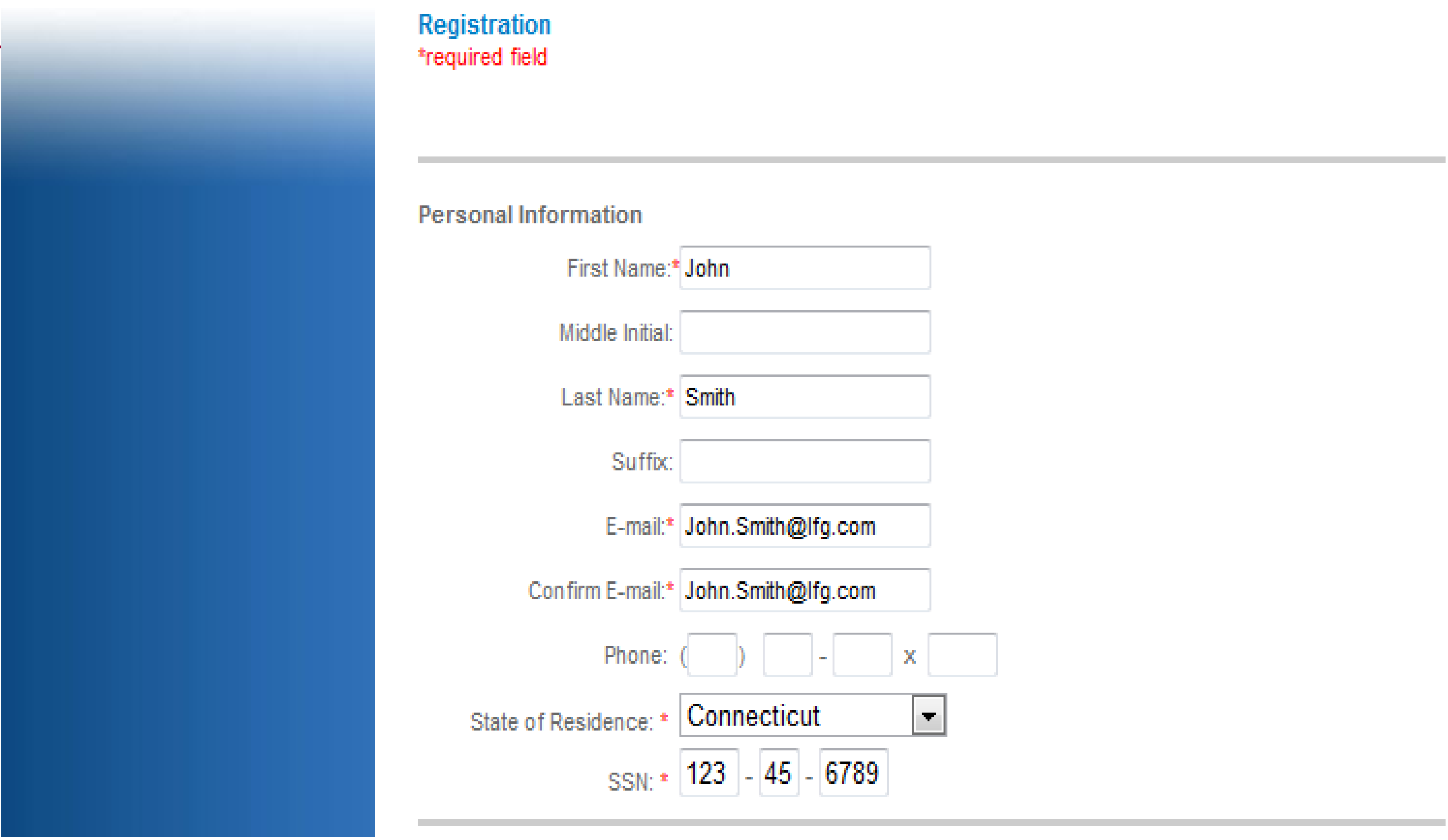


First time visitors must register for the program.

Select “Click Here to Register” on the left.



You will be prompted to fill out information including your first name, last name, e-mail address, resident state, and SSN.

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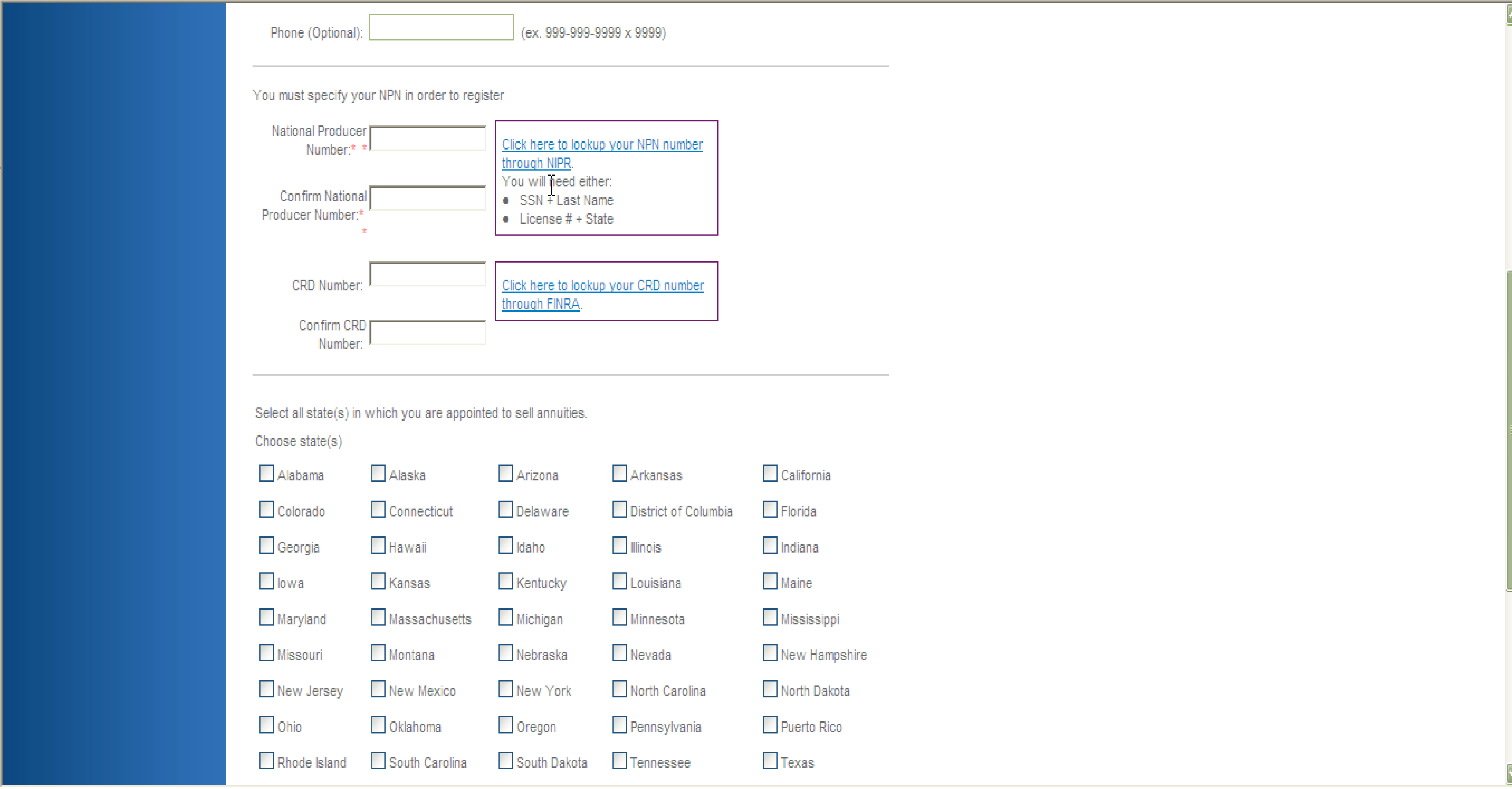
Phone (Optional): (ex. 999-999-9999 x 9999)

You must specify your NPN in order to register

National Producer Number:*

Confirm National Producer Number:*

Click here to lookup your NPN number through NIPR.
You will need either:
- SSN + Last Name
- License # + State

CRD Number:

Confirm CRD Number:

Click here to lookup your CRD number through FINRA.

Select all state(s) in which you are appointed to sell annuities.

Choose state(s)

Alabama	Alaska	Arizona	Arkansas	California
Colorado	Connecticut	Delaware	District of Columbia	Florida
Georgia	Hawaii	Idaho	Illinois	Indiana
Iowa	Kansas	Kentucky	Louisiana	Maine
Maryland	Massachusetts	Michigan	Minnesota	Mississippi
Missouri	Montana	Nebraska	Nevada	New Hampshire
New Jersey	New Mexico	New York	North Carolina	North Dakota
Ohio	Oklahoma	Oregon	Pennsylvania	Puerto Rico
Rhode Island	South Carolina	South Dakota	Tennessee	Texas

Scroll down the page to select the state(s) in which you are licensed to sell annuities. You may also include your CRD number if you are appointed to sell Lincoln's variable annuities

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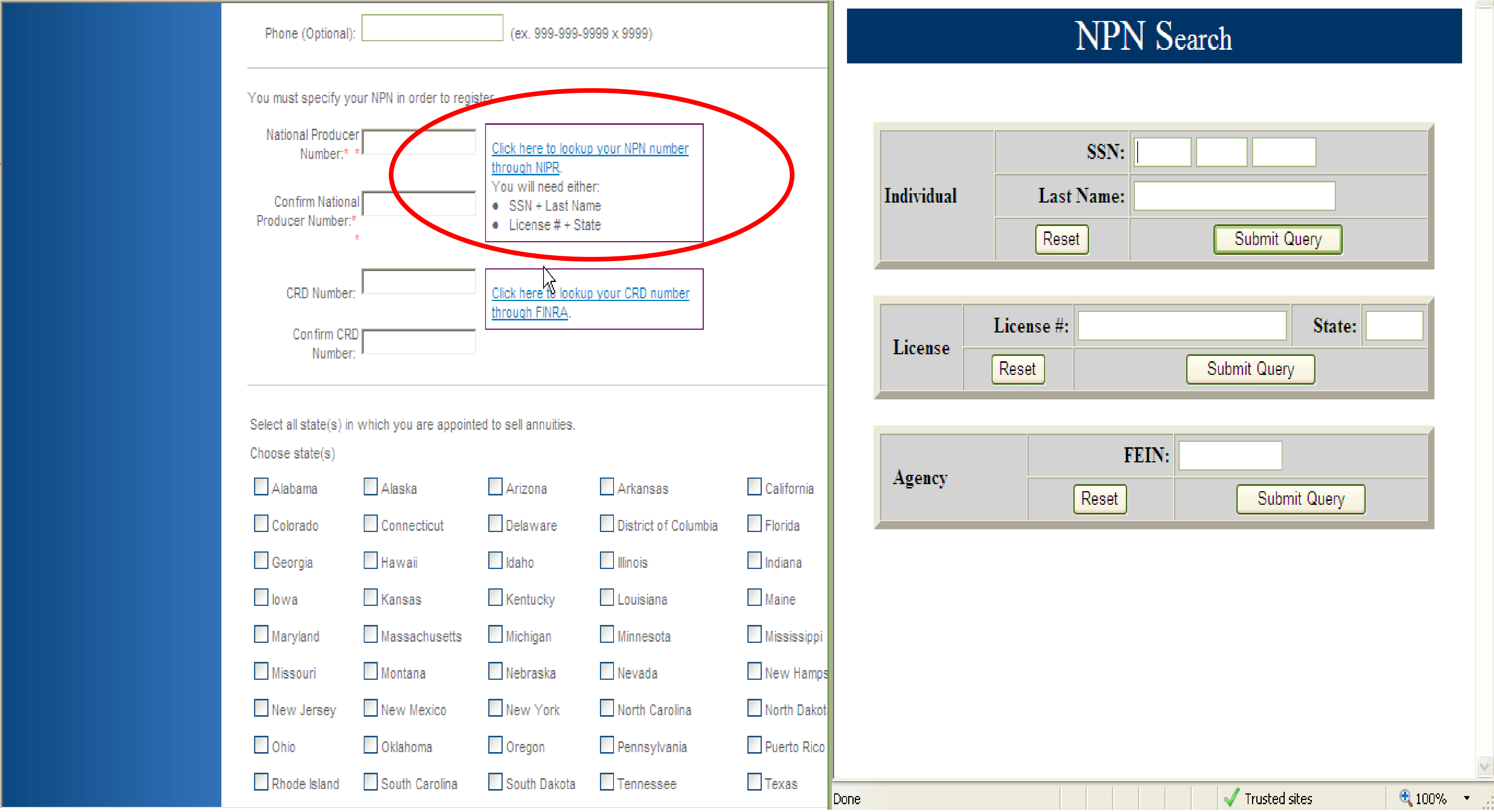

If you do not know your NPN Number, select “Click here to lookup your NPN number through NIPR.” You will need your SSN/Last Name or your License #/State or your agency FEIN to search for your NPN number.

The site will automatically populate the NPN number box.

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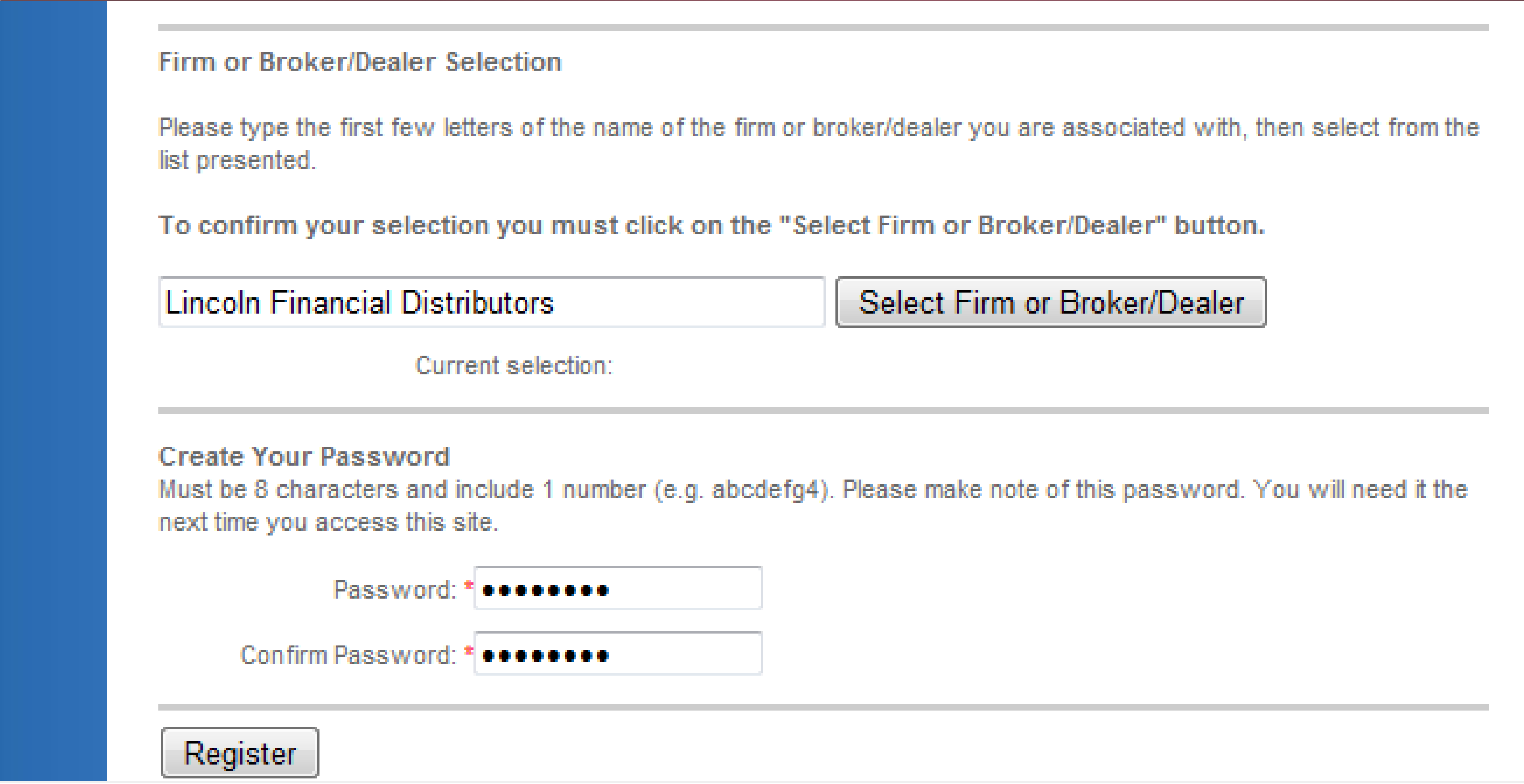

At the end of the page, select a firm or broker/dealer and a password to use and click “Register.” If you are not affiliated with a broker/dealer or your broker/dealer is not found, please select “OTHER”.

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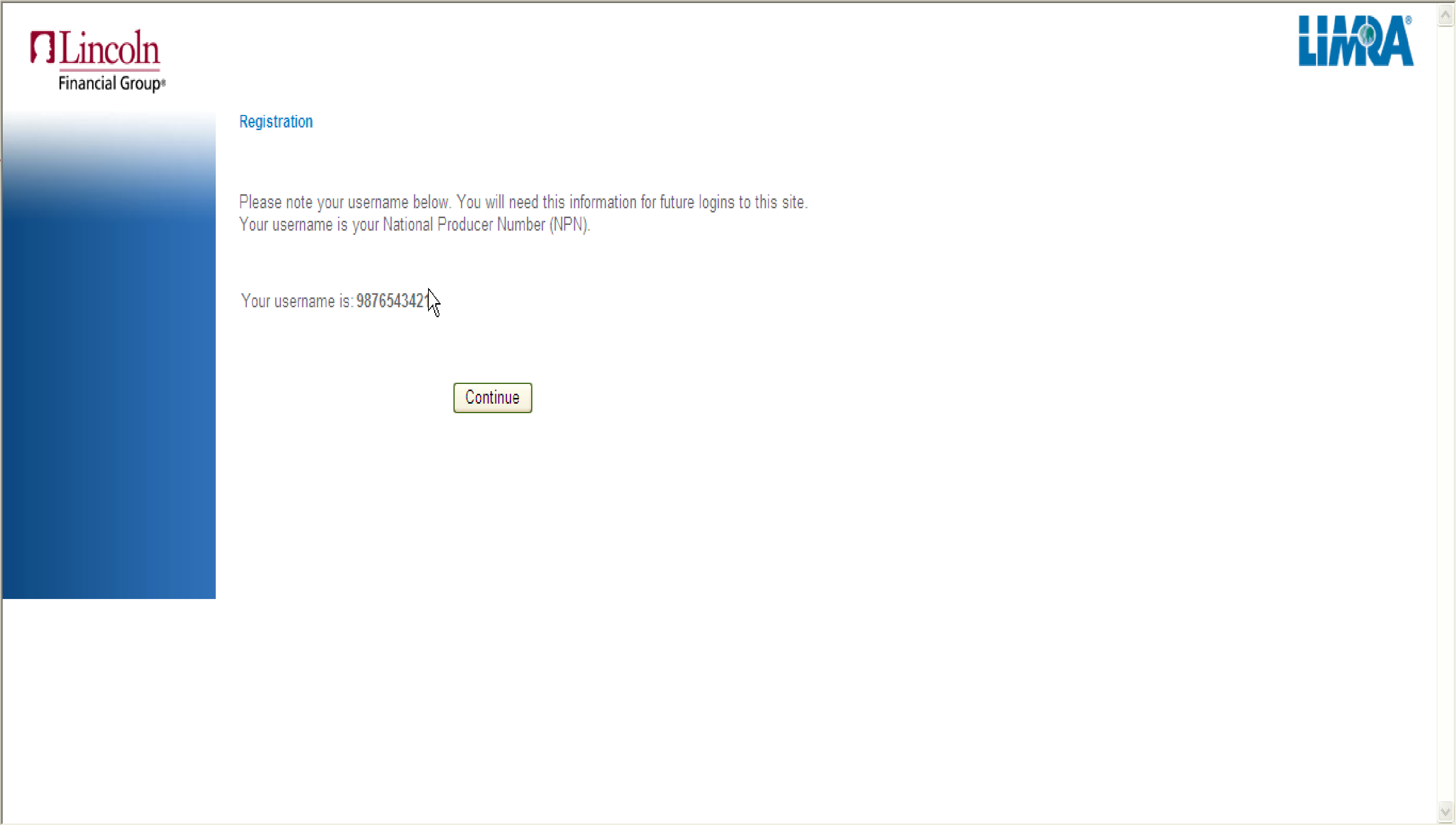

The system will assign a username for you to use along with your password to log onto the site in the future.

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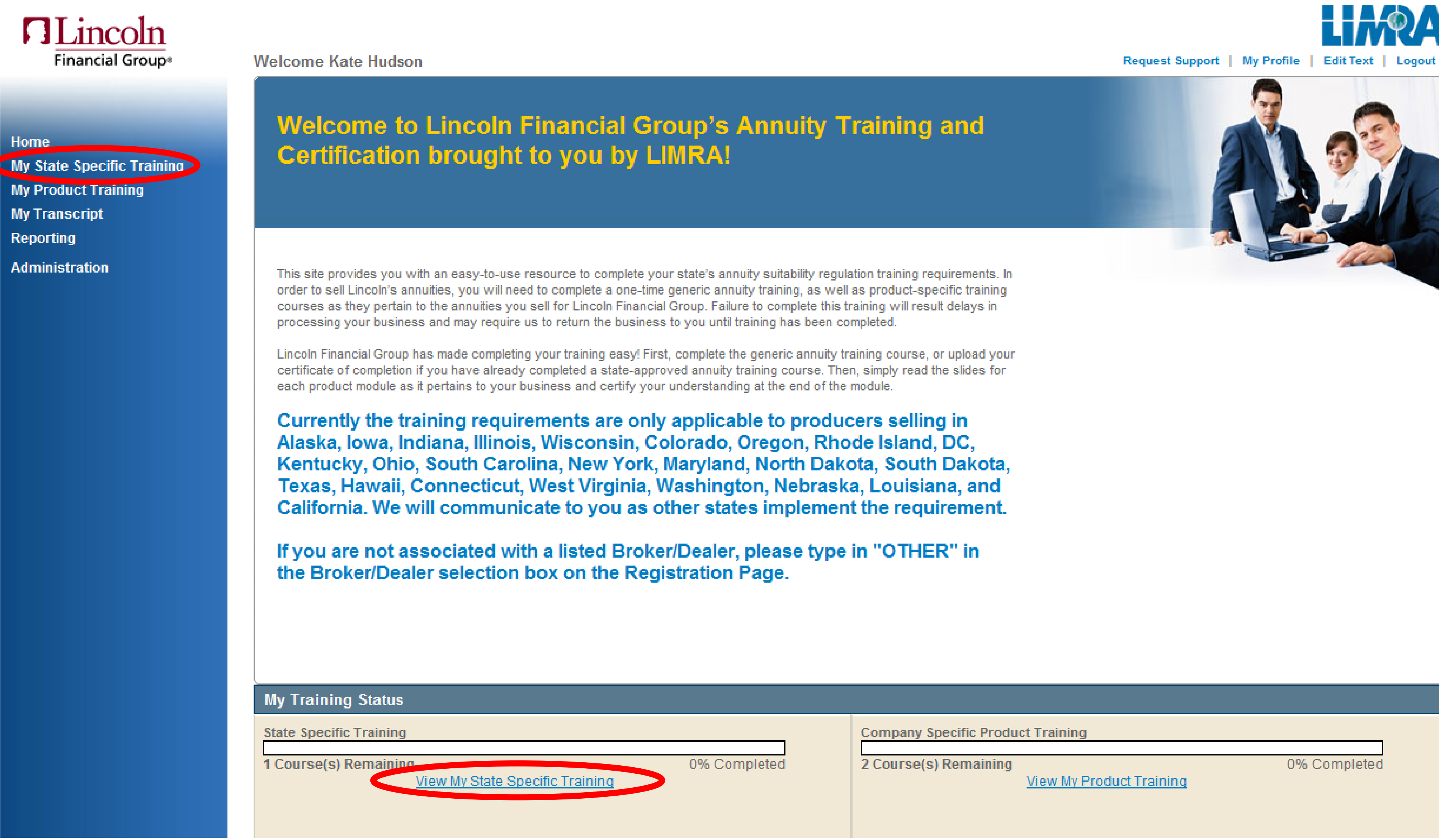

The first page after you log in contains a summary of your state and product training requirements. From this page click on "My State Specific Training" on the left menu or on "View My State Specific Training" towards the bottom of the page in the My Training Status section.

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Welcome Kate Hudson

Request Support | My Profile | Edit Text | Logout

My State Specific Training

Your state's annuity suitability regulation mandates that producers take a one-time four hour general annuity training. This training will include information on the general nature of annuities, appropriate sales practices, and suitable recommendations.

If you have not completed your general education requirement for your selected states, please select from the course listed below

Refresh

Annuities and Suitability Explained – Connecticut

You must complete one of the items below to satisfy the regulation requirements for this state (either the National Underwriter course OR uploading a qualifying CE Certificate from a course you took previously)

☐ **National Underwriter State Specific Course (106-CT)** (click to expand or collapse)

Date Completed

☐ **Annuities and Suitability Explained – Connecticut**
Launch

☐ **Certificate Upload (106-CT)** (click to expand or collapse)

Date Completed

☐ **Import Certificate of Completion - Connecticut**
Launch

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.

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Launch

☐ **Certificate Upload (106-CT)** (click to expand or collapse)

Date Completed

☐ **Import Certificate of Completion - Connecticut**
Launch

Lincoln is excited to announce that we now offer producers the ability to take their NAIC 4 hour general annuity training for **FREE** through Kaplan.

In order to access this service, click on the Kaplan link below that will transfer you to Kaplan's website. Once you are on the Kaplan website you must enter the Lincoln portal code: **LincolnFG** to receive the General Annuity training for free. Click on the Accessing Annuity Training Through Kaplan link for a walk-through for accessing the training.

Kaplan

Accessing Annuity Training Through Kaplan

If you have not completed your state annuity training, click "Launch" under "National Underwriter CE Course". A pop up will appear to take you to Kaplan to complete the state annuity training. Click on the underlined word "Kaplan" in the pop up.

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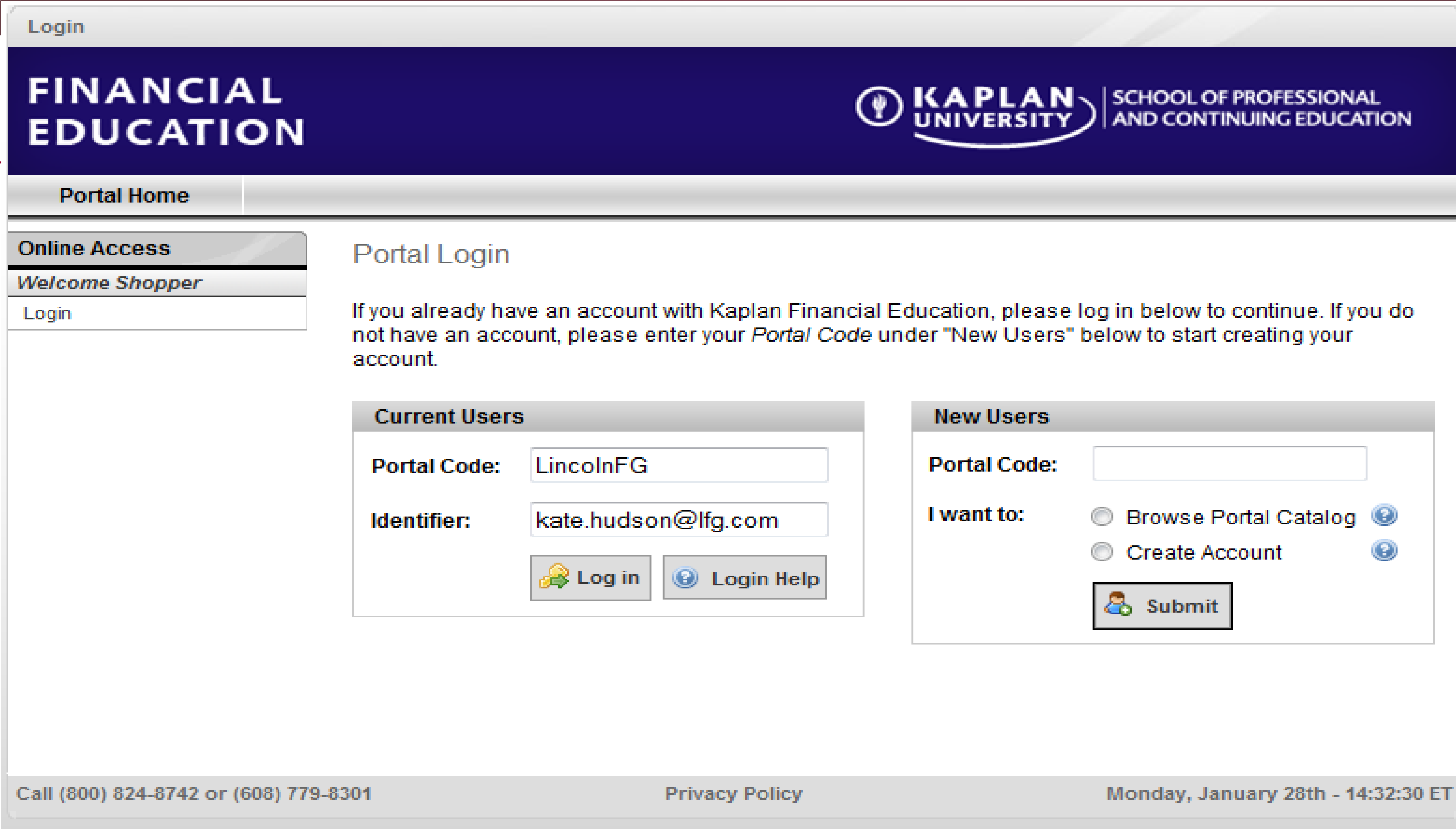

On the Kaplan log in page, enter LincolnFG for the portal code and the email address you provided LIMRA for the identifier.

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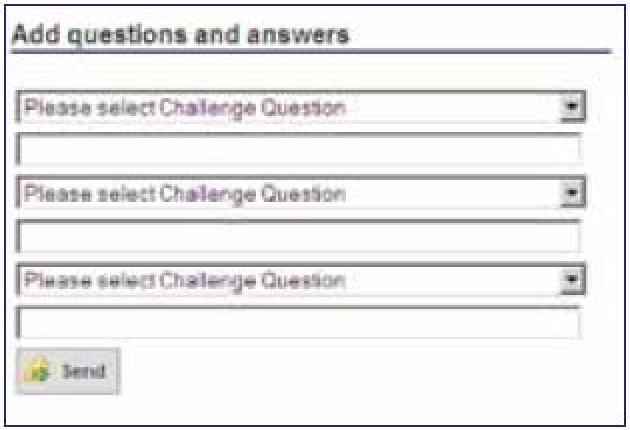

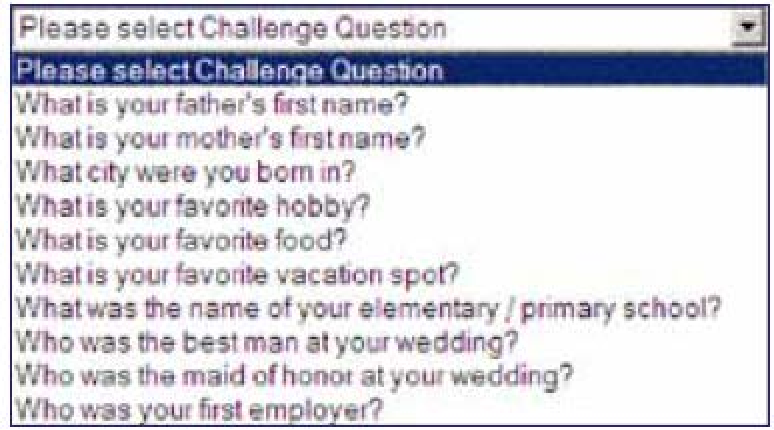

Upon your first time logging into the site, you will be prompted to select and answer three challenge questions.

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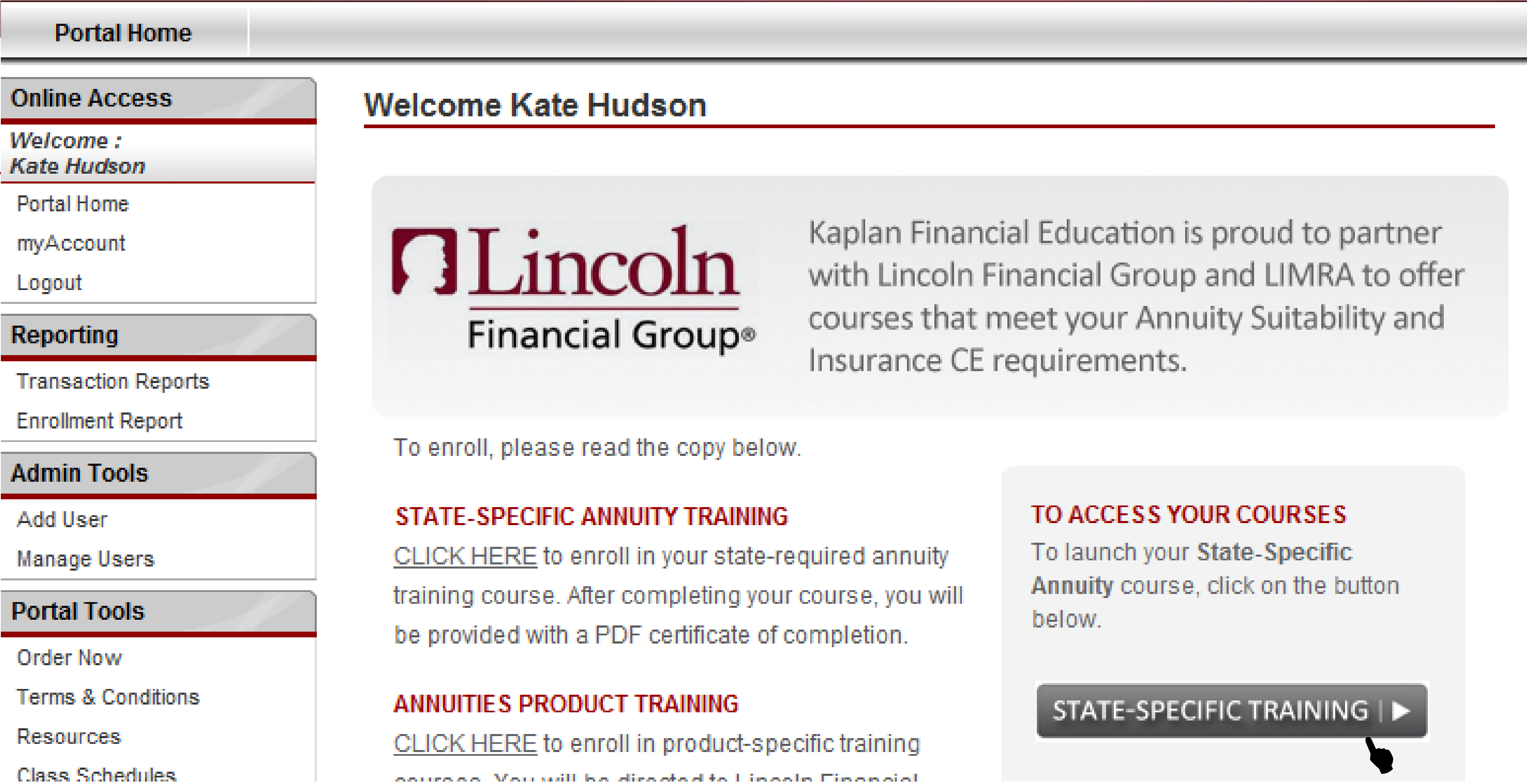
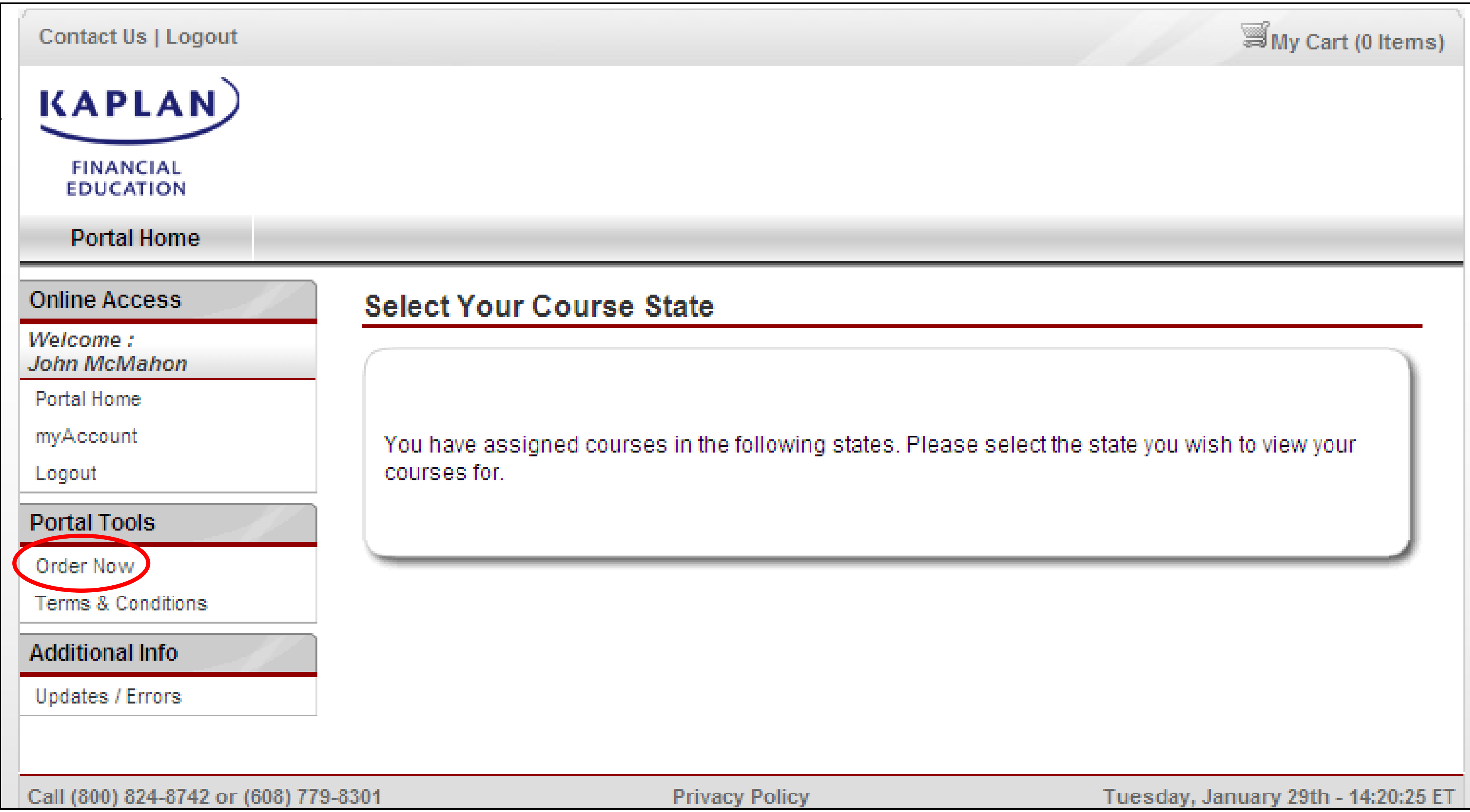
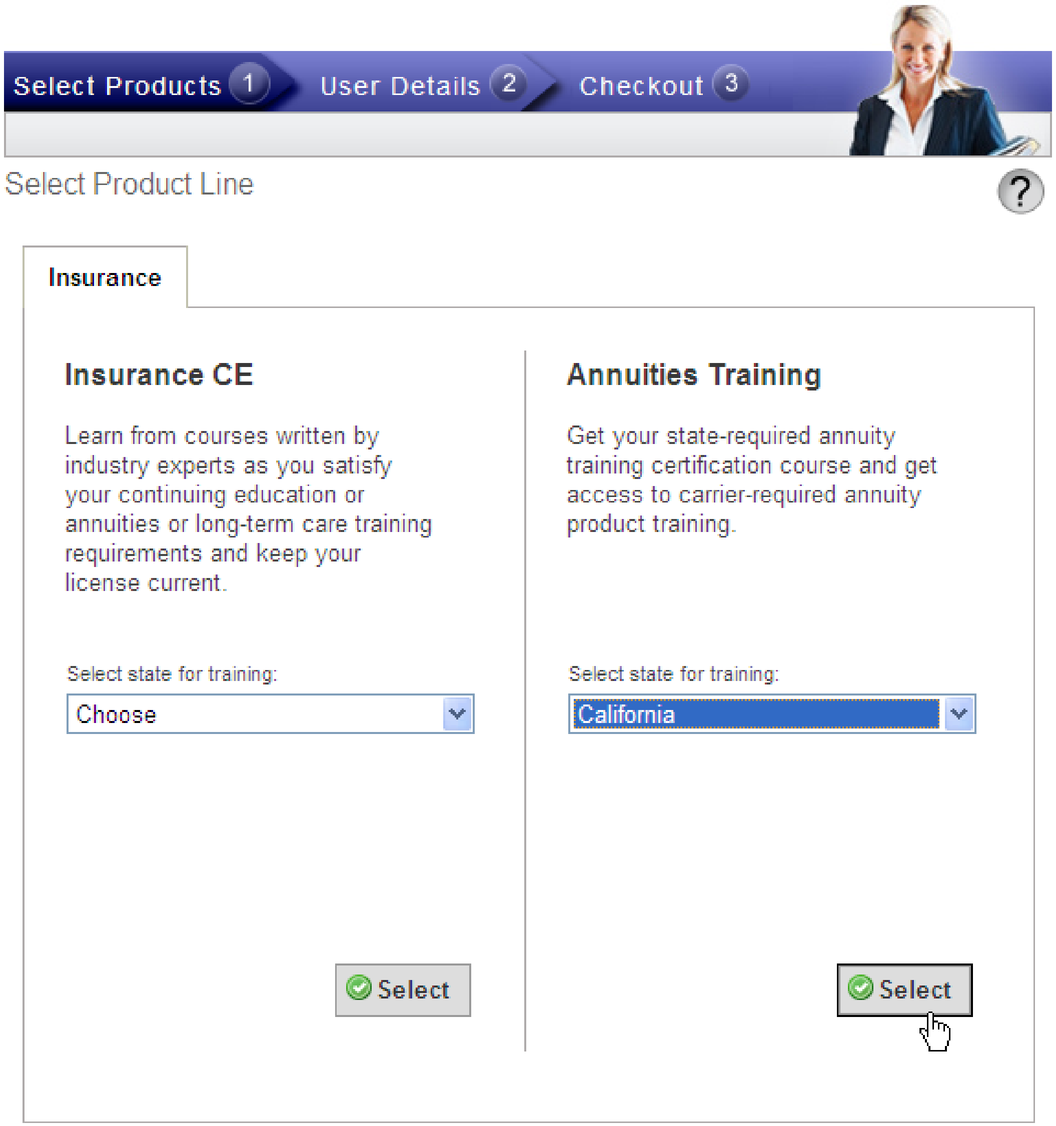


Click on the STATE-SPECIFIC TRAINING button.



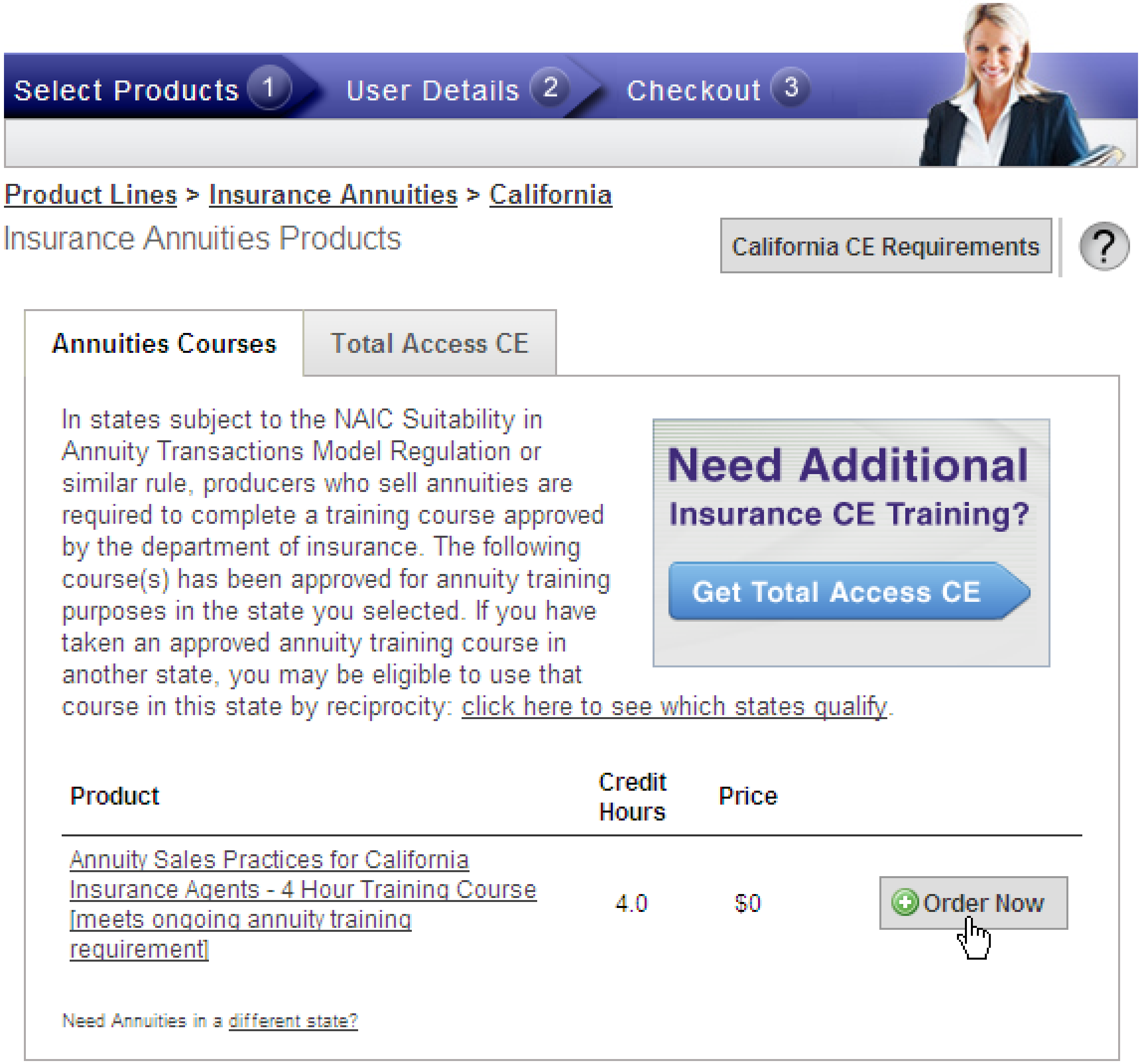
Click on “Order Now” to add General Annuity training to your list of training courses.

Compliance Number

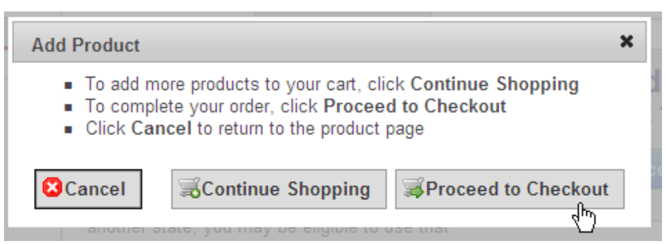


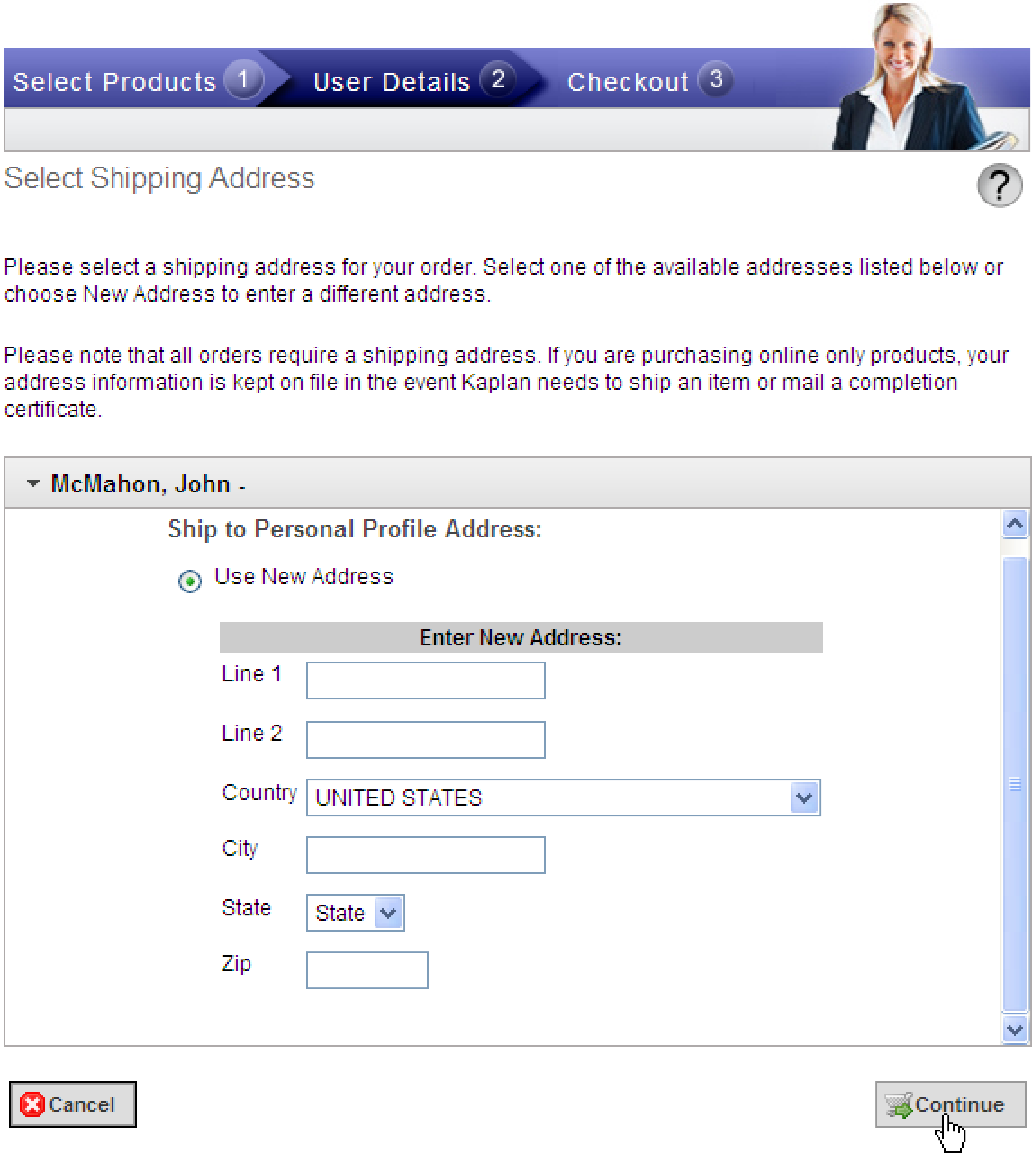
Click on the drop down menu and select the state(s) for the required General Annuity Training.

Then click the “select” box to proceed to the next page.



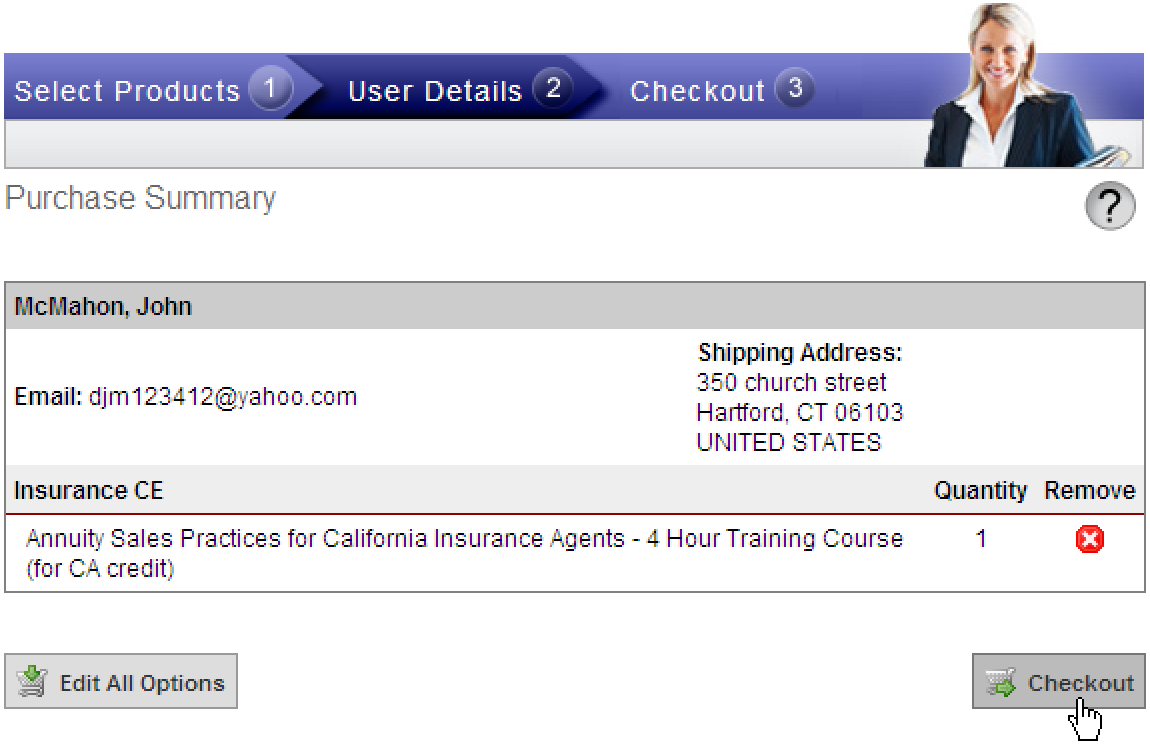
Review your selection and click the "Order Now" button to proceed to checkout. A pop up will appear, click the "Proceed to Checkout" box.



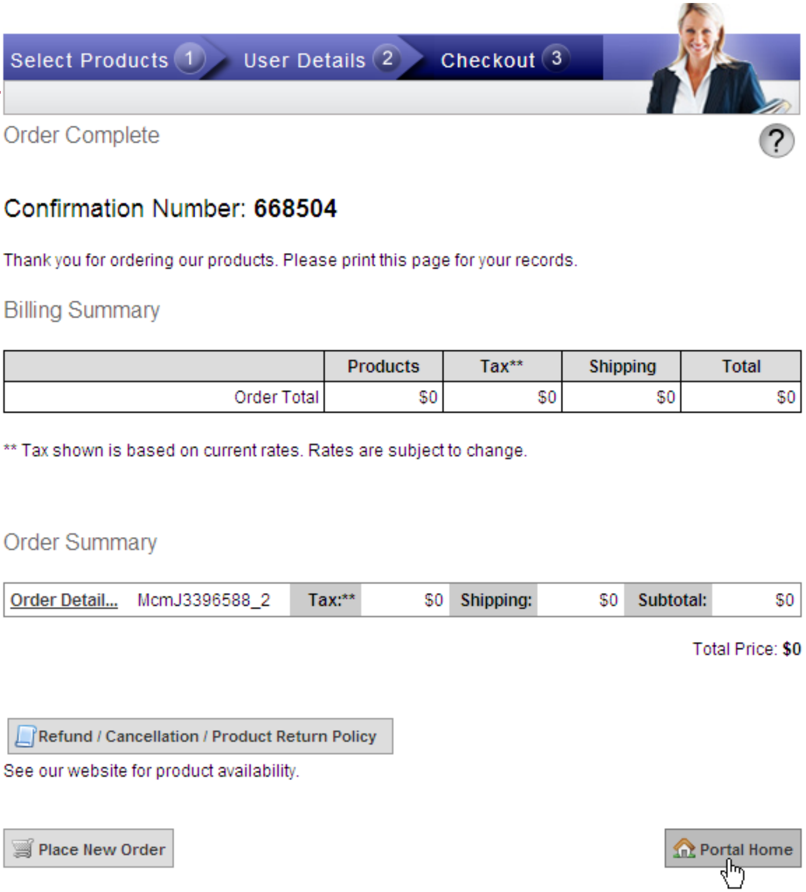


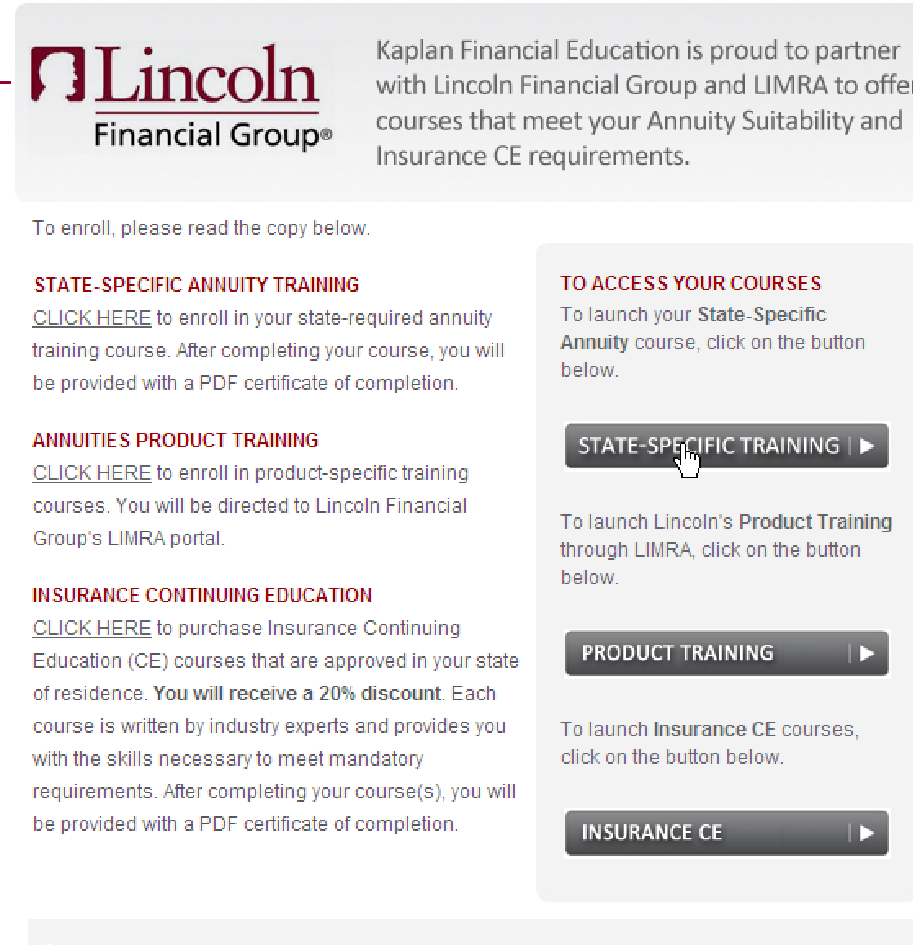
Confirm your mailing address to receive a hard copy of your Certificate of completion after completing your General Annuity Training. Then click "Continue"

Compliance Number



Click “Checkout” to review and complete your order.





After receiving your confirmation, click "Portal Home".

After returning to the homepage, click the "State-Specific Training" box.

My Courses << State Selection

Expand All

Fully expand the following line(s) of authority to proceed in launching your desired course and/or exam. A proctor or monitor may be required in your state BEFORE you launch an exam; click on State Requirements to see if this applies to you.

Courses with an asterisks (*) in the Total Credits column can satisfy continuing education requirements for multiple lines of authority. For credit hour details, please click on the information icon next to the course name.

State Requirements

Annuities

Annuity Certification Training

Course	License Type	Credit Hours	Access Expires	Start Work
Annuity Sales Practices for California Insurance Agents - 4 Hour Training Course [meets ongoing annuity training requirement]	Annuity Certification Training	4.00	01/29/2014	Start Work

Under "Annuities" click on "Start Work" to take your General Annuity Training.

Compliance Number

Verify Account Information

McMahon, John:

Please take a moment to ensure your information is correct.

Completion of this course cannot be reported until all required information is correctly provided.

Required Identifiers

CA Insurance License Number

SSN Last 4

Social Security Number

Edit

Confirm Carriers for Completion Reporting

Click Here to Select All Carriers

- [x] Lincoln Financial
  SSN Required

- [ ] I do NOT want this course completion reported

Continue to Course

Remind Me Later

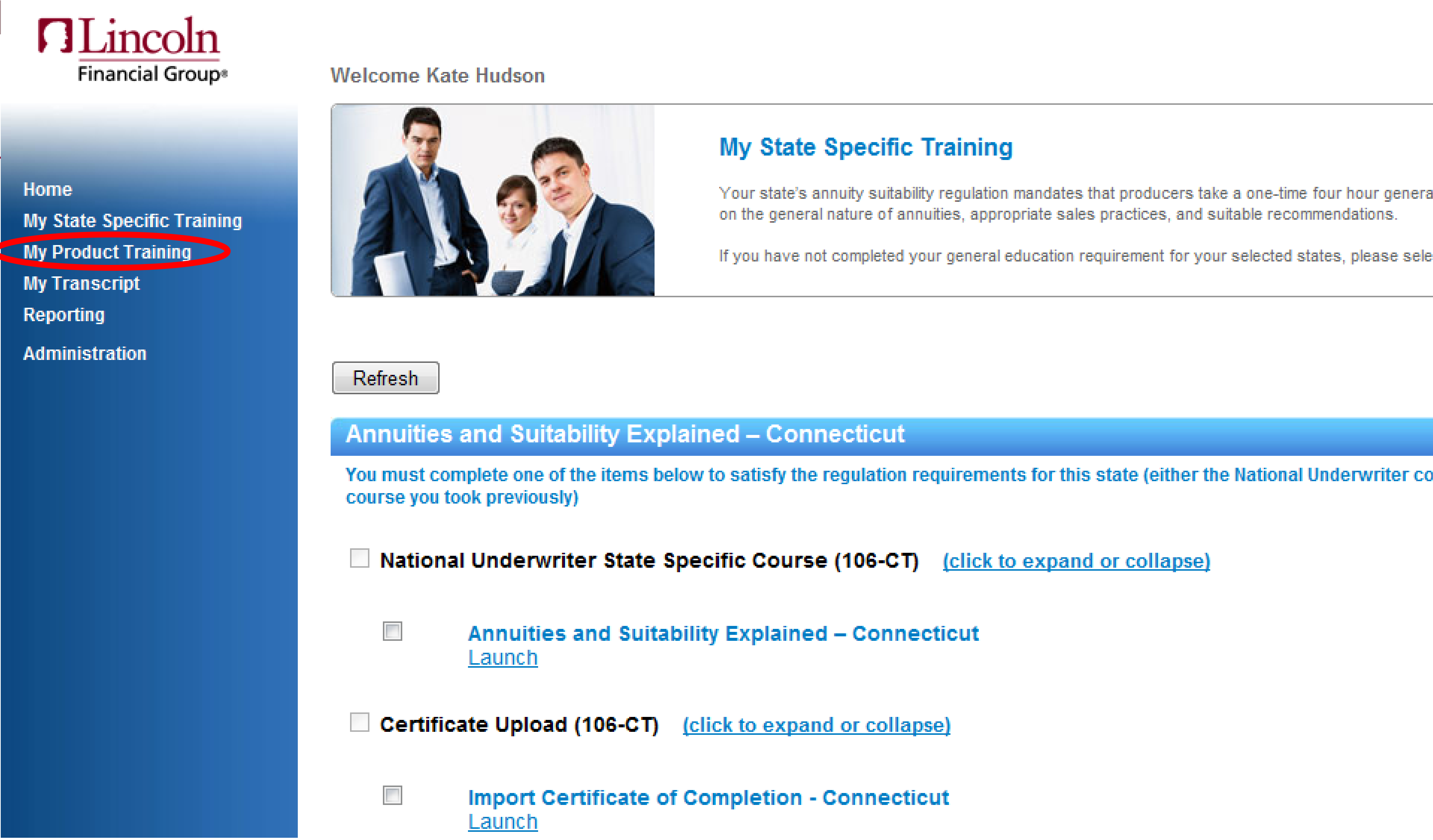
In providing this information, you authorize Kaplan to send current and historical completion data to your employer, the annuity carrier, broker/dealer and/or a centralized data warehouse, indicating that you have completed annuities product training.

General Terms & Conditions

DTCC Terms & Conditions

Security: Personal Information is sent and received over secure HTTPS channels.

To report the completion to Lincoln, enter your Insurance License number and your Social Security number. When completed, click "Continue to Course" to take the training.



When you have completed your state annuity training through Kaplan, return to the browser window that has the LIMRA website open.

Click on “My Product Training” located on the left menu.

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Welcome Kate Hudson

Request Support | My Profile | Edit Text

My Training

Here you can access all the required training and courses to satisfy your state's annuity suitability regulations. Please check back often as the train will be updated as required by state regulatory changes and product line-up changes. Product-specific training as mandated by regulation must be updated when product availability and features are updated, and producers must complete the updated training in order to continue selling annuities

Click on the course name to launch a course. You must click the "Refresh" button to view completion checkmarks.

Refresh

Lincoln Financial Product Specific Training *Broker: Lincoln Financial*

Completion of the following product courses is required for producers who sell our annuity products. This training includes information and product features unique to Linc Financial Group's specific annuity products. You need only complete the courses associated with the product lines you sell.

Variable Annuities (click to expand or collapse)

Date Completed

Variable Annuities Course (VA.3.0)
Launch

Fixed Annuities (click to expand or collapse)

Date Completed

Fixed Annuities Course (FA.2.0)
Launch

On the product-specific training page, select the product line(s) with which you are affiliated to take the required course(s).

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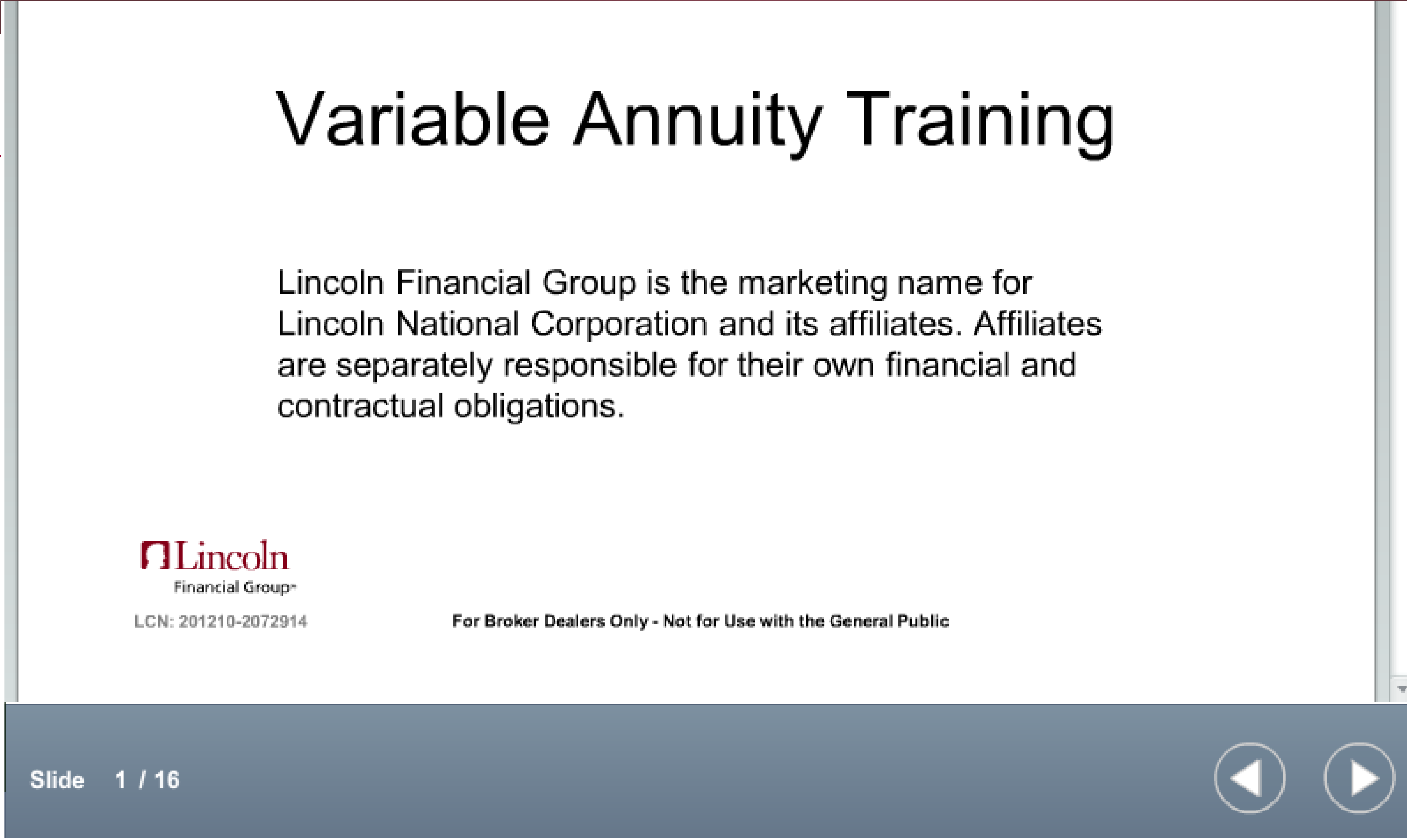

The PowerPoint training course will open for the product line you selected. Read each slide carefully. When the training is complete, you will be certified to sell your lines of authority!

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