

Product Training Instructions/FAQs

Charles Schwab: Communication received from Charles Schwab for self enroll site. Licensee will need to follow instructions communicated in email from Charles Schwab.

Charles Schwab Welcome Page:

- 1) Once on the welcome page, scroll down where you will then see the Carrier Product Training. Click the appropriate carrier for product training courses.

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Portal Home

Online Access

Welcome :

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Resources

To access your Pre-Licensing Study Materials recently assigned by Vertafore, click the Insurance Licensing button above.

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Welcome

Kaplan Financial Education is pleased to partner with Charles Schwab to offer Insurance Continuing Education self-study courses. This site also is your place to obtain needed courses to meet the NAIC requirements – both State Specific Annuities Training and Carrier Product Training.

Carrier Product Training courses to meet the NAIC Model Regulation 275 and complete the necessary training.

Use the links in the blue box to the right to enroll and then access your carrier product training courses.

State Specific Annuity Training courses to meet your state requirements for an annuity course.

Use the links in the green box to the right to enroll and then access your state specific annuity training course.

ALSO AVAILABLE:

Continuing Education (CE) courses that enable you to maintain your license and state approved required courses to sell specific products (ie: Annuities)

Insurance Prelicensing courses to become insurance licensed

Carrier Product Training

Click the links below to select courses for each carrier:

[Great West](#)

[Nationwide](#)

[New York Life](#)

After enrolling, [Click Here to Access](#) your Carrier Product Training.

State Specific Annuities Training

[Click Here to Enroll](#) in your State Specific Annuity Training courses.

After enrolling, [Click Here to Access](#) your State Specific Training courses.

- 2) You will then be brought to the Product Training Courses for New York Life. Click “Select” next to the appropriate course you would like to enroll in and once finished, click “Proceed to checkout”

Product Training | Annuities Courses | Total Access CE

In states subject to the NAIC Suitability in Annuity Transactions Model Regulation or similar rule, producers may not solicit the sale of an annuity product without adequate knowledge of the product. The following product-specific training courses are supplied by the indicated carriers to enable you to meet this requirement. You are required to complete a product-specific training course for each product (or product group) you intend to sell.

Need Additional Insurance CE Training?
Get Total Access CE

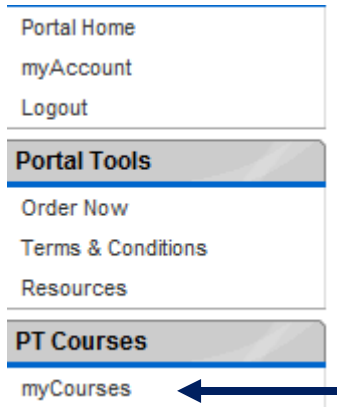
Category	Course Name	Status	Action
Great West			Select All
	Great-West: Schwab OneSource Annuity	-	<input type="button" value="+ Select"/>
Nationwide			Select All
	Nationwide Income Promise	-	<input type="button" value="+ Select"/>
	Nationwide Platinum Edge	-	<input type="button" value="+ Select"/>
	Schwab Income Choice	-	<input type="button" value="+ Select"/>
New York Life			Select All
	NewYork Life Fixed Period Income Annuity	-	<input type="button" value="+ Select"/>
	New York Life Lifetime Income Annuity	-	<input type="button" value="+ Select"/>
			<input type="button" value="Proceed to Checkout"/>

- 3) Once through the checkout process, you will be enrolled in the product training you selected. You can then access the product training you enrolled in by clicking “Product Training” at the top ribbon.

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Portal Home | **Product Training**

4) From there, you will need to click “myCourses” under the left navigational panel:



5) You will see a list of the product training courses you are currently enrolled in. Click the Product Training Course name to launch the course.

My Courses

Product	Course Info	Status	Test Score	Completion	Access Time
Great-West Schwab OneSource Annuity		Not Started	N/A	N/A	309 of 365 days left
Nationwide Income Promise		Not Started	N/A	N/A	309 of 365 days left
Nationwide Platinum Edge		Not Started	N/A	N/A	309 of 365 days left
New York Life Lifetime Income Annuity		Not Started	N/A	N/A	309 of 365 days left
New York Life Fixed Period Income Annuity		Not Started	N/A	N/A	309 of 365 days left
Schwab Income Choice		Not Started	N/A	N/A	309 of 365 days left

- “How do I create a user account?”
 - You will receive communication from Charles Schwab via email on how to self enroll on the Charles Schwab portal.

- “I forgot my password?” Or “How do I reset my Password”
 - Visit: <https://www.kfeducation.com/login/recover/portal> and enter your email address and the portal code from the distributor communication. An email will be sent with details on how to activate your account and reset your password

- “How do I enroll in Annuities courses?”
 - Log into the portal under Annuities Training select the “Click Here” link on the right hand side of the page under the State Specific Annuities Training menu. Select the appropriate state in which you need Annuities Certification and click on “Select”. Next select “Order Now” or “Need Annuities in a different state?”, then “Proceed to Checkout”. It will present you with your shipping address; select “Continue” as no products will be shipped. Next, on the Purchase Summary page select “Check Out”. Select “Continue” on the Shipping Method page (nothing will be shipped). Next, select “Continue” on the Purchase Summary Page. To complete the order process, select “Order Now” from the Order Confirmation page.

- “How do I update my personal information?”
 - Log into the Kaplan portal and select “My Account” from the left hand menu. Select “Edit User” and make appropriate changes. Once you’ve made the changes, select “Update”.

- “Will I be charged for my Product Training or Annuities Training Courses?”
 - No, you will not be.

- “How do I enter in my SSN?”
 - You must select the “Edit” option and enter in the SSN and select “Save”