



Reliance Standard

REQUIRED CARRIER SPECIFIC TRAINING (CST) INSTRUCTIONS

Annuity Carrier Specific Product Training and state mandated **NAIC Annuity Training** (see STATE ANNUITY SUITABILITY TRAINING REQUIREMENT for regulation) must be completed prior to soliciting business. Failure to do so will result in rejected business. Please carefully review the information below and provide a copy of the training certificate to

contracting@nfisolutions.com once complete.

If you will not be participating in solicitation of annuity products with this carrier, you can bypass the CST requirements. **Life** producers are required to abide by the rules set in place by the carrier for any additional training requirements. Review **ADDITIONAL REQUIRED TRAINING** before proceeding.

Annuity Carrier Specific Product Training

Who should complete the product training?

All agents, regardless of state, are required to take the product training.

When can the product training be taken?

Product training is available at any time and must be taken prior to submitting the agent contracting. Reliance Standard will not review or process agent contracting unless the product training is in good order. A copy of the certificate must be submitted to NFI along with the agent contract. Reliance Standard prefers that agents do not solicit business until after the agent appointment/contract is complete. Taking the product training course and writing business on the same day is acceptable however, not preferred.

Product Training Directions: See attached PRODUCT SPECIFIC TRAINING-USER'S GUIDE for directions

Go to: <http://rsli.succesce.com>

Additional Required Training

Anti-Money Laundering Training (AML):

Reliance Standard will accept AML training from the vendors listed below. If the course was taken through another vendor, a copy of the certificate can be submitted for review. If Reliance Standard deems the outside vendor as nonacceptable the agent will be required to take the course with an approved vendor. Reliance Standard does not track renewals AML training; AML certificate only needs to be provided once. If AML is not in good order, commissions will be held.

LIMRA	Fire Solutions
RegEd	Metlife Securities
Kaplan	Securities America
WebCE	
QuestCE	
SuccessCE	

If AML is done through LIMRA we can pull the certificate for you if you will send us your LIMRA password. If done through another vendor or you wish not to share your password please send us the certificate of completion.

Step 1: Go to <http://rsli.successce.com>

Step 2: Complete the **Last Name & SSN** fields, then click **Register**.

RSLI Continuing Education Center - Windows Internet Explorer

https://rsli.successce.com/PSTRSLI.aspx

File Edit View Favorites Tools Help

★ Favorites ★ Suggested Sites Free Hotmail Web Slice Gallery

RSLI Continuing Education Center

NAFA
National Association for Fixed Annuities
Securing the future!

In Affiliation with
SUCCESS CE

**Welcome to the
Reliance Standard Life Insurance Company
Continuing Education Center**

Last Name:

SSN

Required by your insurance company for annuity suitability and product specific training verification. Only last 4 digits will show on your account.

Not yet registered?

You must register before you can enter the site.
For Customer Service call SuccessCE at (949) 706-9453

Internet 100%

Step 3: Complete the **Personal Information** Section, then click **Save**.

The screenshot shows a web browser window titled "Personal Information - Windows Internet Explorer". The address bar displays "https://rsl.successce.com/PSTRegisterMember.aspx". The browser's menu bar includes File, Edit, View, Favorites, Tools, and Help. Below the menu bar are links for Favorites, Suggested Sites, Free Hotmail, and Web Slice Gallery. The main content area is titled "Personal Information" and contains a form with the following fields:

- Login Email Address: *JohnDoe@DoeFinancial.com
- Home/Pers Email: *JohnDoe@gmail.com
- MasterID (if known):
- First Name: *John
- Middle Name:
- Last Name: *Doe
- Address: *123 Any Street
- City, State Zip: *Anytown, *PA, *19103
- Company: *Doe Financial
- Broker/Dealer:
- Business Phone: *(215)555-1212
- Home Phone: *(215)333-1212
- SSN: *111-22-3333
- Date of Birth: *01/01/1957

Below the fields, there are two checkboxes:

- ☐ Yes, I want to receive information about my continuing education from the Success Family of CE Companies
- ☐ Yes, please sign me up for the e-mail reminder service designed to ensure your license never expires.

A red rectangle highlights the "Save" button at the bottom of the form. The browser's status bar at the bottom shows "Done" and "Internet".

Step 4: Once you click the **Save** button, a section where Licensing information needs to be entered will appear. Enter your **State & License Number**, and be sure to click the yellow **Save License Number** button.

Personal Information - Windows Internet Explorer

https://rsl.successsce.com/PSTRegisterMember.aspx

File Edit View Favorites Tools Help

Personal Information

FEATURES

- State Requirements
- Contact Us

Add/Verify License Information to Continue Required = *

Login Email Address * JohnDoe@DoeFinancial.com

Home/Pers Email * JohnDoe@gmail.com

MasterID (if known)

First Name * John

Middle Name

Last Name * Doe

Address * 123 Any Street

City, State Zip * Anytown * PA * 19103

Company * Doe Financial

Broker/Dealer

Business Phone * (215)555-1212

Home Phone * (215)333-1212

SSN * 111-22-3333

Required by your insurance company for annuity suitability and product specific training verification. Only last 4 digits will show on your account.

Date of Birth * 01/01/1957

***Insurance License Information**

Cancel

State License No. Renewal Date

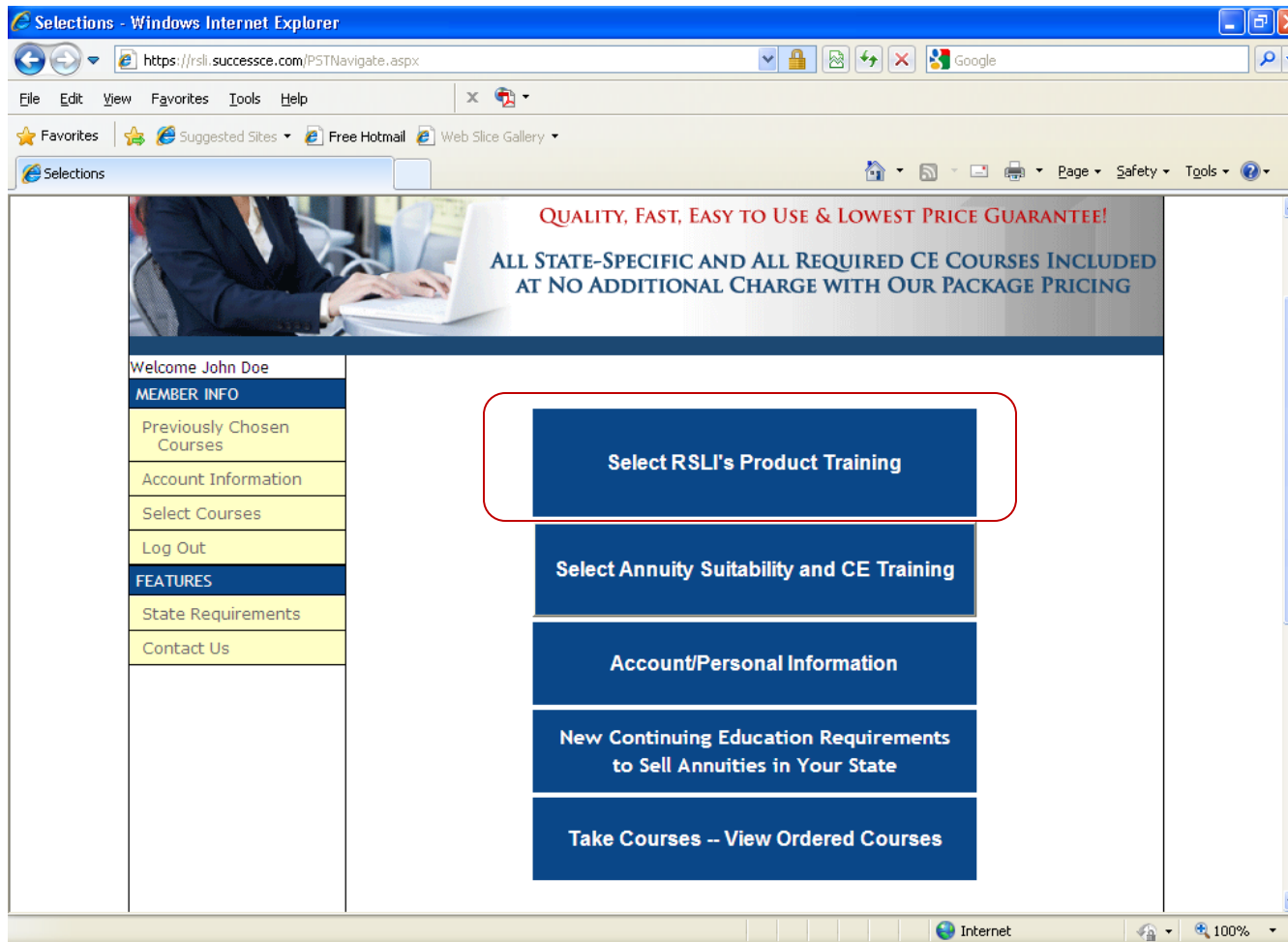
PA 987654 01/01/1900

Save License Number

☐ Yes, I want to receive information about my continuing education from the Success Family of CF Companies

Internet 100%

Step 5: Once your **Personal Information** is complete, a screen will appear with several blue rectangular boxes. Select the first box to take RSL's Product Specific Training Course.



Step 6: Check the box for **Reliance Standard Combined Product Specific Training**, then click **Add Selected Courses**.

The screenshot shows a web browser window titled "PST Course Selection - Windows Internet Explorer". The address bar displays the URL: https://rsls.successsco.com/ProductSpecificTraining_CarriersDetail.aspx?CompanyID=RSLI. The page content includes a sidebar with navigation links: "Welcome John Doe", "MEMBER INFO" (with sub-links: "Previously Chosen Courses", "Account Information", "Select Courses", "Log Out"), and "FEATURES" (with sub-links: "State Requirements", "Contact Us"). The main content area is titled "Carrier: RSLI" and features a banner that reads "AT NO ADDITIONAL CHARGE WITH OUR PACKAGE PRICING". Below the banner are three buttons: "Back", "Select Annuity Suitability CE Training", "Go To Courses Already Ordered", and "Add Selected Courses". A message states: "Click on Boxes on the Right to Select Courses Not Already Ordered or Completed". Below this, a section titled "Courses not yet ordered or completed" includes a red link "Choose Courses Below". A table lists the available course: "Reliance Standard Combined Product Specific Training" with "Course Number: RSCourse1" and a checkbox marked with a checkmark. The checkbox is highlighted with a red rectangle. Below the table is another "Add Selected Courses" button, also highlighted with a red rectangle, with "Back" and "Select Annuity Suitability CE Training" buttons below it. The status bar at the bottom shows the file path "ProductSpecificTraining_CarriersDetail.aspx?CompanyID=RSLI" and the Internet Explorer logo.

PST Course Selection - Windows Internet Explorer

https://rsls.successsco.com/ProductSpecificTraining_CarriersDetail.aspx?CompanyID=RSLI

File Edit View Favorites Tools Help

★ Favorites ★ Suggested Sites Free Hotmail Web Slice Gallery

PST Course Selection

Welcome John Doe

MEMBER INFO

- Previously Chosen Courses
- Account Information
- Select Courses
- Log Out

FEATURES

- State Requirements
- Contact Us

Carrier: RSLI

AT NO ADDITIONAL CHARGE WITH OUR PACKAGE PRICING

Back **Select Annuity Suitability CE Training**

Go To Courses Already Ordered

Add Selected Courses

Click on Boxes on the Right to Select Courses Not Already Ordered or Completed

Courses not yet ordered or completed Choose Courses Below

Reliance Standard Combined Product Specific Training	N/C
Course Number: RSCourse1	<input checked="" type="checkbox"/>
Reliance Standard Combined Product Specific Training	

Add Selected Courses

Back **Select Annuity Suitability CE Training**

ProductSpecificTraining_CarriersDetail.aspx?CompanyID=RSLI

Internet 100%

Step 7: Click the **Open Course** button.

Information - Windows Internet Explorer

https://rsl.successce.com/MyInformation2.aspx

File Edit View Favorites Tools Help

Information

THE SUCCESS FAMILY OF CE COMPANIES

QUALITY, FAST, EASY TO USE & LOWEST PRICE GUARANTEE!

ALL STATE-SPECIFIC AND ALL REQUIRED CE COURSES INCLUDED AT NO ADDITIONAL CHARGE WITH OUR PACKAGE PRICING

Welcome John Doe

MEMBER INFO

- Previously Chosen Courses
- Account Information
- Select Courses
- Log Out

FEATURES

- State Requirements
- Contact Us

Take Your Courses

Purchased courses:

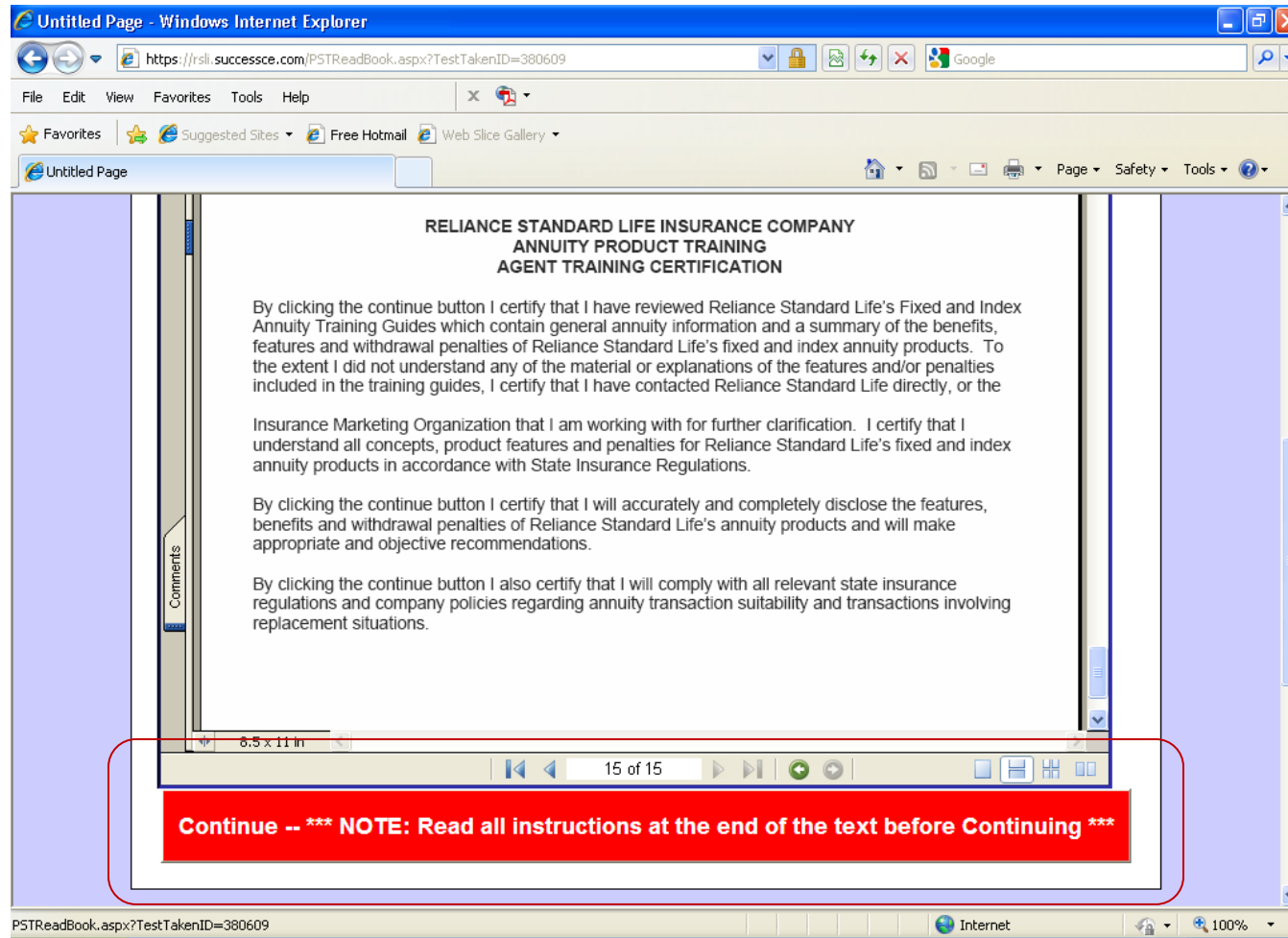
= complete

Reliance Standard Combined Product Specific Training PST RSCourse1 0.0

Open Course

Done Internet 100%

Step 8: Once the PDF opens, read the 15-page training guide, then click the red **Continue** button when finished.



Step 9: Click the **Print Certificate** button if you wish. You do not need to send this into RSL, as we will be able to see that the course has been completed. This certificate is for your records only.

The screenshot shows a web browser window titled "Information - Windows Internet Explorer". The address bar displays "https://rsl.successce.com/MyInformation2.aspx". The browser interface includes standard menus (File, Edit, View, Favorites, Tools, Help) and a search bar. The main content area is titled "THE SUCCESS FAMILY OF CE COMPANIES" and includes the text "QUALITY, FAST, EASY TO USE & LOWEST PRICE GUARANTEE!" and "ALL STATE-SPECIFIC AND ALL REQUIRED CE COURSES INCLUDED AT NO ADDITIONAL CHARGE WITH OUR PACKAGE PRICING". Below this, a sidebar on the left contains links for "Welcome John Doe", "MEMBER INFO", "Previously Chosen Courses", "Account Information", "Select Courses", "Log Out", "FEATURES", "State Requirements", and "Contact Us". The main content area is titled "Take Your Courses" and includes a section for "Purchased courses:". A legend indicates that a green square represents a completed course. A list of purchased courses is shown, with the first entry, "Reliance Standard Combined Product Specific Training PST RSCourse1 0.0", highlighted in green. A red box highlights the "Print Certificate" button next to this course.

https://rsli.successce.com/MakeCert.aspx?TestTakenID=380609 - Windows Internet Explorer

Save a Copy Print Email Search Review & Comment Sign

Select Text 58%

THE SUCCESS FAMILY OF CE COMPANIES
AFFORDABLE CE · FIRSTCHOICE CE · CLIENTELL CE · SUCCESS CE
KNOWLEDGE IS EVERYTHING

Certificate of Course Completion

This certifies that John Doe N/A XXX-XX-3333
(Student Name) (Agent ID/License Number) (Social Security Number)

has completed our program of online (interactive) studies, Reliance Standard Combined Product Specific Training RSCourse1
(Course Title) (Course Number)

on 04/30/2012 for N/A credit hours in the state of N/A
(Date) (Hours) (State)

J. William "Bill" Cooley
Authorized Signature of Provider/School Official
J. William "Bill" Cooley - Director

04/30/2012
Date

Reliance Standard Reliance Standard
Provider Name Provider Number

2 Corporate Plaza Drive, Suite 100 · Newport Beach, CA 92660
Phone: (949) 706-9453 · Fax: (949) 706-9439

11 x 8.5 in 1 of 1

Mandatory Annuity CE:

ALABAMA	KANSAS	NORTH DAKOTA
ALASKA	KENTUCKY	OHIO
ARIZONA	LOUISIANA	OKLAHOMA
CALIFORNIA*	MAINE	OREGON
COLORADO	MARYLAND	RHODE ISLAND
CONNECTICUT	MASSACHUSETTS	SOUTH CAROLINA
DELAWARE	MICHIGAN	SOUTH DAKOTA
DISTRICT OF COLUMBIA	MINNESOTA	TENNESSEE
GEORGIA	MISSISSIPPI	TEXAS***
HAWAII	MISSOURI	VIRGINIA
IDAHO	MONTANA	WASHINGTON
ILLINOIS	NEBRASKA	WEST VIRGINIA
INDIANA	NEW HAMPSHIRE	WISCONSIN
IOWA**	NEW JERSEY	WYOMING

Additional requirements for select states:

*CALIFORNIA	An initial 8-hour state specific course is required, with a 4-hour refresher course on annuity suitability every 2 years prior to license renewal. California training is not reciprocal with any other state and does not accept training from any other state.
**IOWA	Agents selling indexed annuities must take a 4-hour course specific to indexed annuity products.
***TEXAS	Resident agents must complete 8 hours of CE biennially – specifically relating to annuities. An initial Texas specific 4-hour course is required for resident agents.

States exempt from training requirement:

ARKANSAS	NEW MEXICO	PENNSYLVANIA
FLORIDA	NEW YORK	UTAH
NEVADA	NORTH CAROLINA	VERMONT