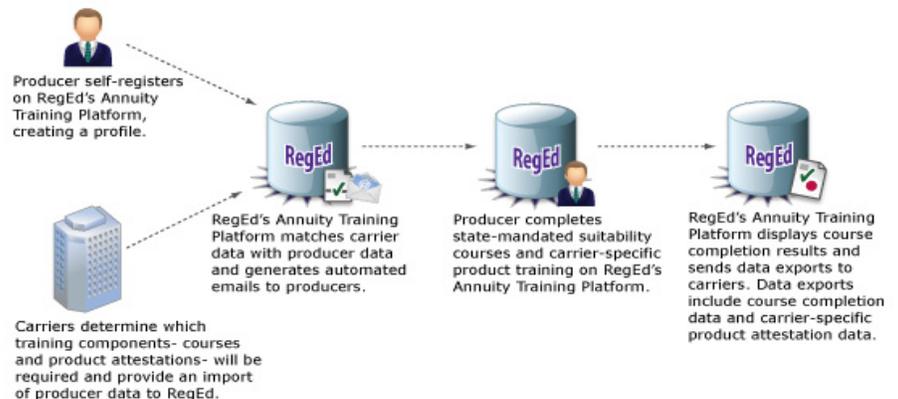# RegEd

Real-time Reciprocity and Tracking to Meet Today's Training Requirements

RegEd Solution

Completing annuities training and notifying carriers and distributors of course completion is easy through RegEd's *Annuities Training Platform (ATP)*. *ATP* is the industry-wide solution that enables producers to complete the required state suitability and carrier-specific product training on one shared platform. Once a producer completes the required training through *ATP*, the platform automatically notifies all associated carriers and distributors. Carriers and distributors also have access to the platform and can run reports to verify course completions when necessary.

Producer self-registers on RegEd's Annuity Training Platform, creating a profile.

Carriers determine which training components- courses and product attestations- will be required and provide an import of producer data to RegEd.

RegEd's Annuity Training Platform matches carrier data with producer data and generates automated emails to producers.

Producer completes state-mandated suitability courses and carrier-specific product training on RegEd's Annuity Training Platform.

RegEd's Annuity Training Platform displays course completion results and sends data exports to carriers. Data exports include course completion data and carrier-specific product attestation data.

Benefits

For Carriers

➢ Producers are trained on one efficient platform and course completions are quickly and easily reported to multiple carriers.
➢ Carrier-specific courses are easily assigned to producers and can be updated frequently.
➢ Online producer search displays real-time results.
➢ Data feeds, customized reporting and real-time calls to the RegEd database enable carriers to maintain compliance with state regulations.
➢ Carriers do not need to review multiple courses from vendors; new stated courses are added as approved.
➢ RegEd's Regulatory Affairs team monitors state legislation and regulation and provides guidance to carriers.

For Distributors

➢ Producers are trained on one efficient platform, reducing overall training time.
➢ Course completions are quickly and easily reported to multiple carriers, reducing confusion.
➢ Carrier-specific courses can be efficiently completed by producers; updates are easily assigned and re-taken by producers.
➢ New state courses are added as approved.
➢ RegEd's Regulatory Affairs team monitors state legislations and regulation to provide guidance to distributors.
➢ New producers may not need to complete training as part of the new hire process – their training on the platform will move with them.

For Producers

- Producers are trained on one efficient platform and course completions are quickly and easily reported to multiple carriers.
- Carrier-specific courses can be efficiently completed by producers.
- Emails alert producers when a carrier course must be completed or when it must be updated.
- New state courses are added as approved.
- State-mandated training is free to the producer; courses are eligible for CE credit for a certificate fee, plus applicable state fees.

Getting Started

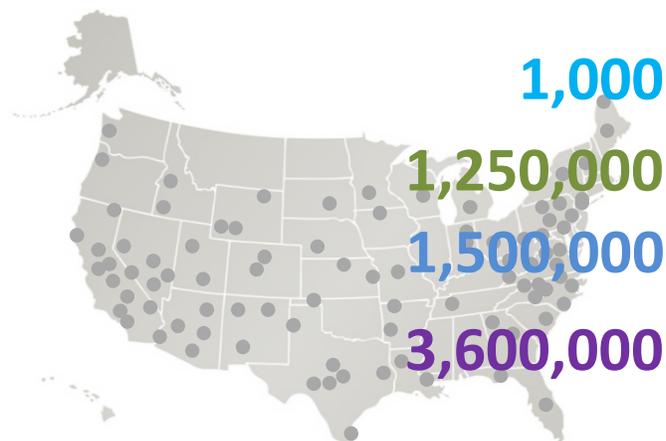To complete the required training, producers simply follow three easy steps:

1. Register as a user on ATP by going to www.reged.com/trainingplatform.
2. Indicate the state(s) where annuity products are sold.
3. Complete the required state suitability training and any assigned carrier-specific product training training.

Upon completion of state suitability and carrier-specific product training courses, RegEd will automatically notify the affiliated carriers and distributors that training has been completed.

Why Choose RegEd?

RegEd is the leading provider of compliance management, licensing and registration and compliance and product education solutions to the financial services industry. Our solutions deliver unparalleled levels of operational efficiency and enable firms to cost-effectively comply and manage risk associated with state, FINRA and SEC regulation.

- An investment in RegEd technology translates into extraordinary long-term value. Firms can cost-effectively build on their initial investment as their needs evolve, maximizing the return and value for their compliance spend.
- RegEd solutions are continuously expanded using input from solution-specific client advisory boards.
- Clients view RegEd as an extension of their organization. They are assigned an experienced implementation project team and have a dedicated support team, including a relationship manager, product support experts, and experienced, engaged customer service professionals.

1,000	Clients, including 400 enterprise clients, encompassing the nation's top financial services firms
1,250,000	CE courses and insurance certs delivered annually
1,500,000	End users in broker-dealers, insurance companies and brokers
3,600,000	Insurance and securities transactions processed annually