



RegEd Basics

Need To Know Terms

Term	Definition
RegEd	Website that we now use
ATP	Annuity Training Platform – this is the system that RegEd uses for product training.
Product Code	Code entered into RegEd to assign training (only used when training is not automatically assigned).
Producer Status Screen	Screen that shows all current product modules that have been assigned to the agent.

Logging In To ATP

Website:

<https://secure.reged.com/TrainingPlatform/>

IRI Insured Retirement Institute

RegEd

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

[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

AIG Annuities

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 Named Best Mid-Size Technology Company by the North Carolina Technology Association
- StoneRiver Risk and Compliance Acquires Compliance Assurance Corporation
- RegEd Receives Double Nomination for 2012 NCTA 21 Awards

Click here for a full list of participating carriers.

Download our FAQ here.

Producers: Contact us at info@reged.com
Carriers: Contact us at sales@reged.com

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Logging In To ATP

Enter email and password here to log into RegEd ATP

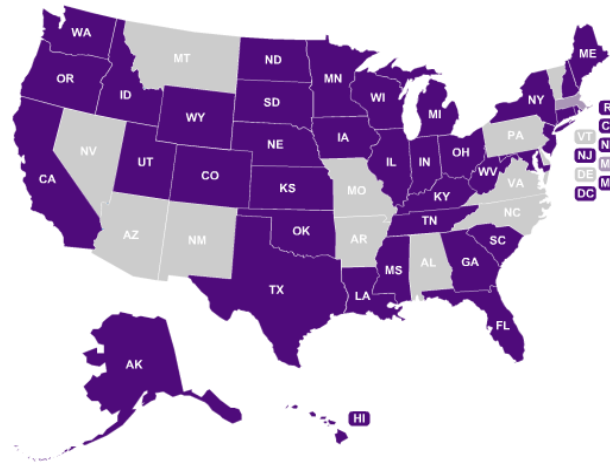
Login Email Address:
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Annuity

Logging In To ATP: First Time Registration

The screenshot shows the RegEd website interface. At the top left is the IRI logo (Insured Retirement Institute). To the right is the RegEd logo and a login form with fields for 'Login Email Address' and 'Password', a 'Save User Name' checkbox, and a 'Go' button. Below the header is a navigation bar with links: TRAINING PLATFORM >>, RULES AND REGULATIONS, News, CONTACT US, and ABOUT US.

The main content area features a welcome message: "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." Below this is a map of the United States with state abbreviations. A legend indicates: dark blue for 'Adopted Requirement', medium blue for 'Requirement Pending Adoption', and light blue for 'No Requirements Pending Adoption'. A yellow arrow points from the text "If you don't have a login, click on the register online button to register." to a red-bordered box containing the 'Producers Get Started' section. This section lists three steps: 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. Below this is a 'News' section with three items: RegEd Named Best Mid-Size Technology Company, StoneRiver Risk and Compliance Acquires Compliance Assurance Corporation, and RegEd Receives Double Nomination for 2012 NCTA 21 Awards. At the bottom right of the page is the copyright notice: ©2010-2015 RegEd.



Logging In To ATP: First Time Registration

This is the form you will see when you click on the “register online” link.

To register, you will need to fill out this form, including your social security number (SSN) and National Producer Number (NPN). These fields are highlighted on the screen print.

Once you have filled out this form, click the register button.



RegEd
Self Registration

Login Information
The security questions / answers are required to help you reset your password, if you forget your password.
Will be used as Login Name and Contact Email
(Passwords must be at least 8 characters, and contain at least 2 alphabetic characters and 2 numbers)

*Login Email: _____
*Password: _____
*Verify Password: _____
*Security Question 1: Select Question [v] *Answer: _____
*Security Question 2: Select Question [v] *Answer: _____
*Security Question 3: Select Question [v] *Answer: _____
(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: [v]
*First Name: _____ *Last Name: _____ MI: [] Sfx: []
*Social Security #: _____
*Verify Social Security #: _____
*Date of Birth: [v] [v] [v]
*National Producer Number (NPN): _____ Find NPN

Business Address

*Address Line 1: _____
Address Line 2: _____
*City: _____ *State: Select a state [v] *Zip Code: _____
*Country: United States [v]
*Phone: _____ Ext: []
Fax: _____

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

Register Clear Form

Secured by Thawte
2015-11-23
ABOUT SSL CERTIFICATES



Logging In: Main RegEd Site

RegEd has multiple websites.

These are directions on how to login from other sites: www.reged.com



The screenshot shows the RegEd website interface. At the top right, the 'Secure Login' link is highlighted with a red rectangular box. A large yellow arrow with a red outline points from the bottom right towards the 'Secure Login' link, with the text 'Click on Secure Login' written inside the arrow. The website header includes the RegEd logo, navigation links (Home, Solutions, Industries, Education, Company, Custom), and social media icons. The main content area features a banner with the text 'Conflicts-of-Interest is High on FINRA's Radar. Do You Have a Plan?' and a 'Learn More' button. Below the banner is a navigation bar with links for 'Broker-Dealers', 'Investment Advisors', 'Insurance Companies', and 'Holding Companies'. The footer contains three sections: 'Identify Risk Before It Happens with SCORE Risk Control Center.' (with an image of black arrows pointing up and one red arrow pointing down), 'Strengthen Organizational Alignment and Governance.' (with an image of a compass), and 'Squeeze Out Inefficiency, Bake in Compliance.' (with an image of four arrows pointing up and one red arrow pointing down, labeled 'Quality Speed Results' and 'Costs').

Logging In: Main RegEd Site

On this screen you need to click on “Annuity Training Platform (ATP)” Link. This will take you to the ATP site and you will follow previous directions to login.

RegEd


Secure Log In

* User Name:

* Password:

* Company Code:

Save User Name and Company Code

 [Forgot your password?](#)

[Quick Answers for Login Problems](#) (* denotes required field)

Login Assistance? Click [here](#) for Live Chat

Other RegEd Sites

[Annuity Training Platform \(ATP\) »](#)

[Xchange »](#)

[CEAuthority »](#)

[Financial Training »](#)

[Social Media Archiving & Compliance »](#)

Home ■ Contact Us ■ Privacy ■ Customer Support

North American Company
for Life and Health Insurance



Navigating RegEd

Once an Agent has logged in – this is the screen they will see:

The screenshot displays the RegEd user interface. On the left is a vertical menu with the following items: Welcome, Producer Status, Enter Product Code, Optional Insurance CE, My Certificates, My Account, FAQs, Midland National Life Insurance Company, and North American Company for Life & Health Insurance. The main content area is titled 'Producer Status' and contains two sections: 'Annuities State Suitability Compliance Summary' and 'Carrier-Specific Product Training'.

Producer Status

Annuities State Suitability Compliance Summary

State	Resident?	Requirement Met?	Product Type	Course Status
Iowa	Yes	Yes	Fixed & Variable	<input type="button" value="View My Courses"/>


Carrier-Specific Product Training

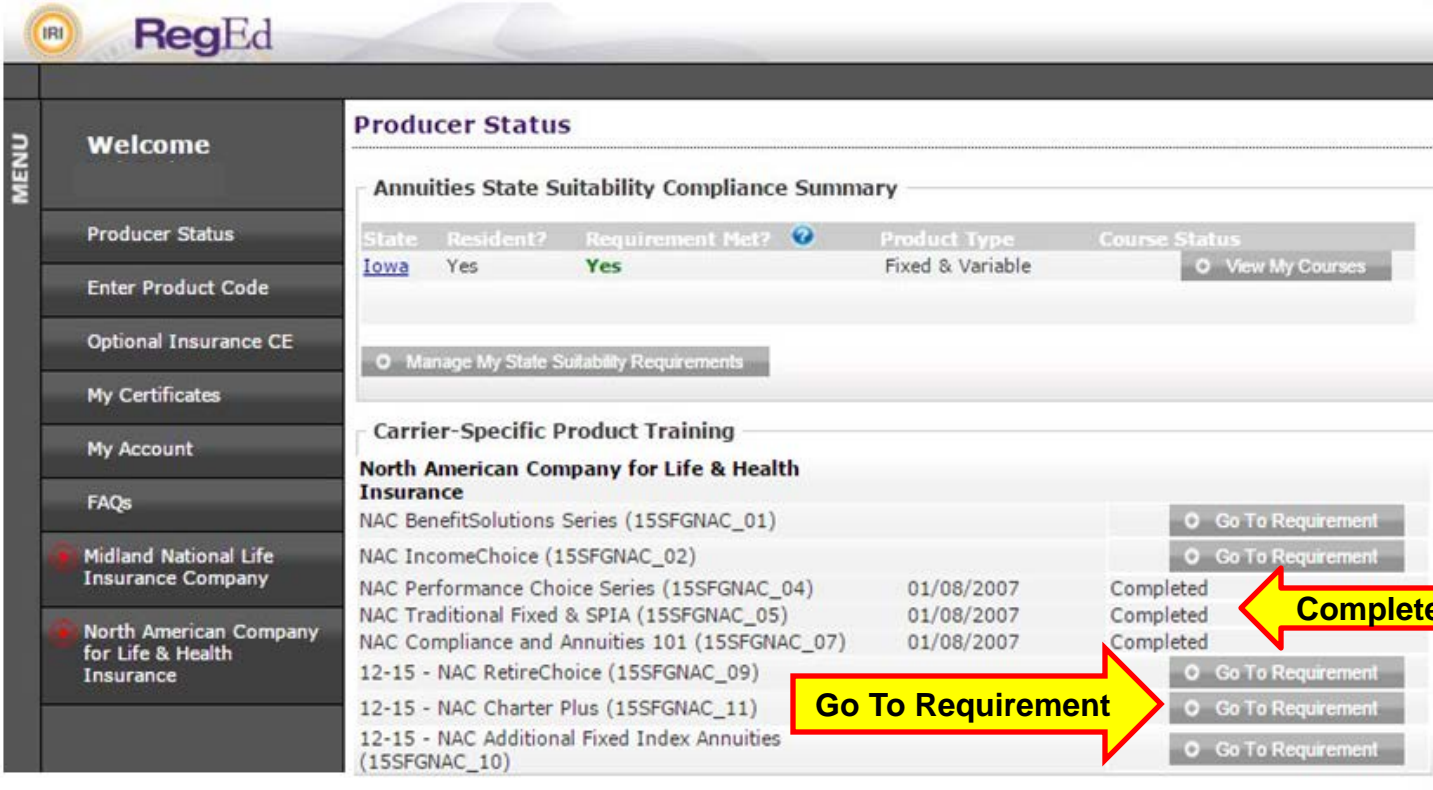
North American Company for Life & Health Insurance

NAC BenefitSolutions Series (15SFGNAC_01)		<input type="button" value="Go To Requirement"/>
NAC IncomeChoice (15SFGNAC_02)		<input type="button" value="Go To Requirement"/>
NAC Performance Choice Series (15SFGNAC_04)	01/08/2007	Completed
NAC Traditional Fixed & SPIA (15SFGNAC_05)	01/08/2007	Completed
NAC Compliance and Annuities 101 (15SFGNAC_07)	01/08/2007	Completed
12-15 - NAC RetireChoice (15SFGNAC_09)		<input type="button" value="Go To Requirement"/>
12-15 - NAC Charter Plus (15SFGNAC_11)		<input type="button" value="Go To Requirement"/>
12-15 - NAC Additional Fixed Index Annuities (15SFGNAC_10)		<input type="button" value="Go To Requirement"/>


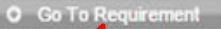
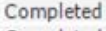
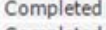
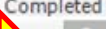



Navigating RegEd

Courses that are already completed will be marked “**completed**” and the agent can no longer review them.

Courses that are not yet completed will have this symbol by them:  In order to take these course, the agent will click on the “Go To Requirement” Button.



The screenshot displays the RegEd web application interface. On the left is a vertical menu with options: Welcome, Producer Status, Enter Product Code, Optional Insurance CE, My Certificates, My Account, FAQs, Midland National Life Insurance Company, and North American Company for Life & Health Insurance. The main content area is titled "Producer Status" and includes a sub-section "Annuities State Suitability Compliance Summary". This summary shows a table with columns for State, Resident?, Requirement Met?, Product Type, and Course Status. The current state is Iowa, with Resident? Yes and Requirement Met? Yes. Below this is a "Manage My State Suitability Requirements" button. The "Carrier-Specific Product Training" section lists courses for North American Company for Life & Health Insurance. The table below shows course details and completion status:

Course Name	Requirement Met?	Product Type	Course Status	Action
NAC BenefitSolutions Series (15SFGNAC_01)	Yes	Fixed & Variable	Not Completed	
NAC IncomeChoice (15SFGNAC_02)	Yes	Fixed & Variable	Not Completed	
NAC Performance Choice Series (15SFGNAC_04)	Yes	Fixed & Variable	Completed	
NAC Traditional Fixed & SPIA (15SFGNAC_05)	Yes	Fixed & Variable	Completed	
NAC Compliance and Annuities 101 (15SFGNAC_07)	Yes	Fixed & Variable	Completed	
12-15 - NAC RetireChoice (15SFGNAC_09)	Yes	Fixed & Variable	Not Completed	
12-15 - NAC Charter Plus (15SFGNAC_11)	Yes	Fixed & Variable	Not Completed	
12-15 - NAC Additional Fixed Index Annuities (15SFGNAC_10)	Yes	Fixed & Variable	Not Completed	

Yellow arrows point to the "Completed" status in the table and a "Go To Requirement" button.

Navigating RegEd

If an agent wants to take a course that is NOT assigned to them, they will click on the “Enter Product Code” Button

The screenshot displays the RegEd website interface. On the left, a vertical menu contains several options, with 'Enter Product Code' highlighted by a red rectangular box. A yellow arrow with the text 'Click Here' points from the right towards this button. The main content area is titled 'Producer Status' and includes a section for 'Annuities State Suitability Compliance Summary'. This section contains a table with columns for 'Requirement Met?', 'Product Type', and 'Course Status'. Below this, there is a 'Carrier-Specific Product Training' section for 'North American Company for Life & Health Insurance', which lists various training courses and their completion status.

Requirement Met?	Product Type	Course Status
	Fixed & Variable	<input type="radio"/> View My Courses

Carrier-Specific Product Training	Completion Status
North American Company for Life & Health Insurance	
NAC BenefitSolutions Series (15SFGNAC_01)	<input type="radio"/> Go To Requirement
NAC IncomeChoice (15SFGNAC_02)	<input type="radio"/> Go To Requirement
NAC Performance Choice Series (15SFGNAC_04)	Completed
NAC Traditional Fixed & SPIA (15SFGNAC_05)	Completed
NAC Compliance and Annuities 101 (15SFGNAC_07)	Completed
12-15 - NAC RetireChoice (15SFGNAC_09)	<input type="radio"/> Go To Requirement
12-15 - NAC Charter Plus (15SFGNAC_11)	<input type="radio"/> Go To Requirement
12-15 - NAC Additional Fixed Index Annuities (15SFGNAC_10)	<input type="radio"/> Go To Requirement

Navigating RegEd

The agent needs to enter the Product Code in that correct field and then click submit. This will allow them to see the training on their Producer Status Screen



- MENU
- Welco
Lori Bochner
- Producer Status
- Enter Product Code
- Optional Insurance CE
- My Certificates
- My Account
- FAQs
- Midland National Life Insurance Company
- North American Company for Life & Health Insurance

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 Product Code Here & Click Submit

Product Code	NAC Module Name
15SFGNAC_01	NAC BenefitSolutions Series
15SFGNAC_13	NAC IncomeChoice With Threshold Participation REV 5-2016
15SFGNAC_09	NAC RetireChoice & Income Pay Plus/Income Pay Riders
15SFGNAC_15	NAC Performance Choice Series With Threshold Participation REV 5-2016
15SFGNAC_05	NAC Traditional Fixed & SPIA
15SFGNAC_10	NAC Additional Fixed Index Annuities & Income Pay Plus/Income Pay Riders
15SFGNAC_07	NAC Compliance and Annuities 101
15SFGNAC_11	NAC Charter Plus & Income Pay Plus/Income Pay Riders

Navigating RegEd

The agent will now see the training on their Producer Status Screen:

RegEd

MENU

- Welcome
- Producer Status
- Enter Product Code
- Optional Insurance CE
- My Certificates
- My Account
- FAQs
- Midland National Life Insurance Company
- North American Company for Life & Health Insurance

Producer Status

Annuities State Suitability Compliance Summary

State	Resident?	Requirement Met?	Product Type	Course Status
Iowa	Yes	Yes	Fixed & Variable	<input type="button" value="View My Courses"/>

Carrier-Specific Product Training

North American Company for Life & Health Insurance

NAC BenefitSolutions Series (15SFGNAC_01)		<input type="button" value="Go To Requirement"/>
NAC IncomeChoice (15SFGNAC_02)		<input type="button" value="Go To Requirement"/>
NAC Performance Choice Series (15SFGNAC_04)	01/08/2007	Completed
NAC Traditional Fixed & SPIA (15SFGNAC_05)	01/08/2007	Completed
NAC Compliance and Annuities 101 (15SFGNAC_07)	01/08/2007	Completed
12-15 - NAC RetireChoice (15SFGNAC_09)		<input type="button" value="Go To Requirement"/>
12-15 - NAC Charter Plus (15SFGNAC_11)		<input type="button" value="Go To Requirement"/>
12-15 - NAC Additional Fixed Index Annuities (15SFGNAC_10)		<input type="button" value="Go To Requirement"/>

Now Training Shows up!