



Sagicor Product Training

Please note that there are mandatory training courses that are required prior to submitting applications. Information about these courses is available on the Producer section of Sagicor's website.

You MUST be registered in the portal to access training courses. (If you are not registered, please see the bottom of this email for instructions.)

- Log into the portal, hover over the Training tab
- Select Training Center
- Under Mandatory Training Requirements, select Annuity Training Requirements.
- You will see the Matrix below indicating each product with the required training listed (i.e., Milestone MYGA: Annuity Suitability Training and the Milestone MYGA Product Training are required).
- Click on the course name and the link will take you directly to the online training course. After reviewing all of the materials there will be a test. To register for the test, you must enter your Agent ID (if not yet appointed, use your SSN) and select Start. Upon completion, the system should send us an automatic notification of your status (Pass/Not Successful). There is no limit to the number of times you may take a course and you may take them in any order you choose.

ANNUITY PRODUCT TRAINING REQUIREMENTS

SPIA	Sage Choice	Sage Select	Sage Secure	Milestone MYGA
Annuity Suitability Training	Annuity Suitability Training	Annuity Suitability Training	Annuity Suitability Training	Annuity Suitability Training
		Indexed Annuity Training	Indexed Annuity Training	
SPIA Product Training	Sage Choice Product Training	Sage Select Product Training	Sage Secure Product Training	Milestone MYGA Product Training

AML only

Allows you to write the following: (ALL Producers – Initial Appointment and Every 2 years thereafter)

- Sage Whole Life
- Sage NLUL
- Sage Term
- Interest Sensitive Single Premium Whole Life (ISSPWL)
- Fixed Indexed Single Premium Whole Life (FISPWL)**
- Fixed Indexed Universal Life (FIUL)**

**For agents that are appointed in the State of Iowa (IA): please be advised that there is an ADDITIONAL training requirement, as this state requires producers to submit 4 hours of CE on Indexed product training in order to write Fixed Indexed. Our Annuity Suitability Training Course (#7 below) has been approved by the State of IA. Sagicor's Producer Operating Manual – Section 3.3 Required Training

addresses this. You can go into the Portal under Training/Training Center/Sagicor Producer Operating Manual.

Annuities we offer and Training Required

ALL products require Annuity Suitability Training (This course covers Annuity/Suitability AND Indexed Training)

NOTE: Per above chart, if you submit CE credits in lieu of Sagicor Specific Training (pertaining to Annuity Suitability Training). The CE credits would only satisfy a portion of the training and you would still be required to still complete the Indexed Annuity Training Course – applicable for SELECT/SECURE Products).

FIRST TIME LOGGING IN AND REGISTERING IN THE PORTAL:

- Go to: <https://agent.sagicorlifeusa.com/wps/portal>
- Select “Not a Producer” – This will allow you to register as a producer
- Input all requested information – please take a moment to read notes on the side
- Select your security questions/answers
- Make sure to check off box at bottom indicating agree to Terms and Conditions
- Submit Registration and Log In

Individual: Type in your Social – if you have not yet submitted your paperwork and/or not yet entered into our GIAS system. (When you are fully credentialed your ID number will be automatically added into system).

You will also get another screen which will ask for more personal information such as:

- First name
- Last name
- Address
- Phone number
- Submit Information and Log In
- Will now be in Producer Account Overview Page

Please take a moment to create a bookmark (if using Chrome) or create a favorite (if using Internet Explorer). This will assist you in logging in into the system in the future.

Any additional questions, please feel free to call Sagikor's Producer Resource Center. You can also reach Sagikor at 1-888-724-4267 x4680.

Please print the completion certificate and send to our Licensing & Contracting Department at licensing@3d advisorsinc.com or fax to 586.580.8586.