

QUEST CE

Notice for training

- States that require fixed and income annuity training are: AK, CA, CO, CT, DC, FL, GA, HI, ID, IL, IN, IA, KS, KY, LA, MD, ME, MI, MN, MS, NE, NH, NJ, NY, ND, OH, OR, RI, SC, SD, TN, TX, UT, WA, WV, WI, WY.*
- Fixed and income training is located under course title: "Fixed and Income Product-Specific Training (formerly Horizon Fixed Annuity series)."

General NAIC student directions:

- NAIC login directions for individual users accessing carrier product-specific training and /or NAIC state annuity suitability training.
- Individuals will be taken through a three-step registration process if they are creating a new account.
- To register or log in, users should be directed to: <https://learn.questce.com/naicsuitability/>.

For returning students (with an existing account)

1. On your internet browser, go to <https://learn.questce.com/naicsuitability/>.

* Index training is required in ALL states

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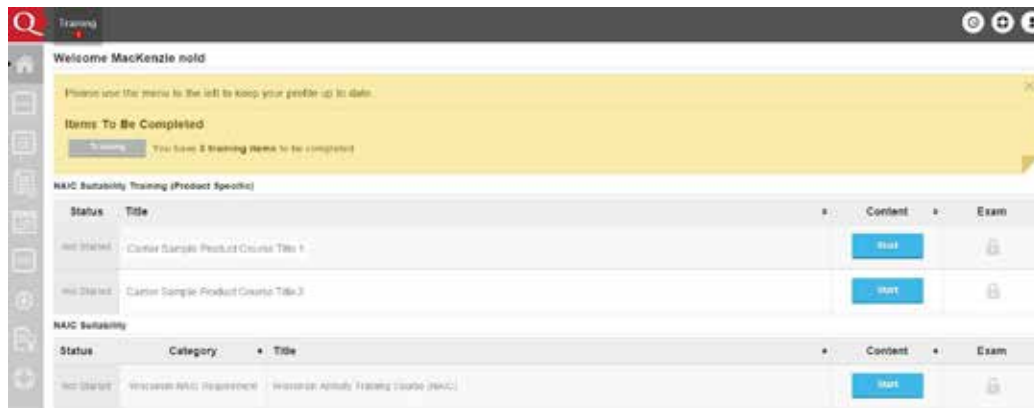
Not a deposit | Not insured by any federal government agency | May lose value | No bank or credit union guarantee | Not FDIC/NCUA/NCUSIF insured

2. If you are returning to the site and have an existing account: Log in to your existing account with your **SSN and last name** (lowercase).
3. Personal Profile Security Setup (One-time requirement for all accounts).



- Upon first login you will be prompted to create a secure profile by establishing three familiar security questions.
- Users who have already completed this secure account set-up process will simply gain access to their account and will not be prompted to create and answer their account security questions again.

4. Once logged in, you are able to start or continue any course previously added to your user dashboard.



5. Add new Product-Specific training to your existing account:

- If you are looking to access a new product training course that is not already listed on your user dashboard (homepage), click **Add Product-Specific** from the menu options on the left. View the list of available product-specific training courses. Check the box to select and add a product-specific training course to your student dashboard.

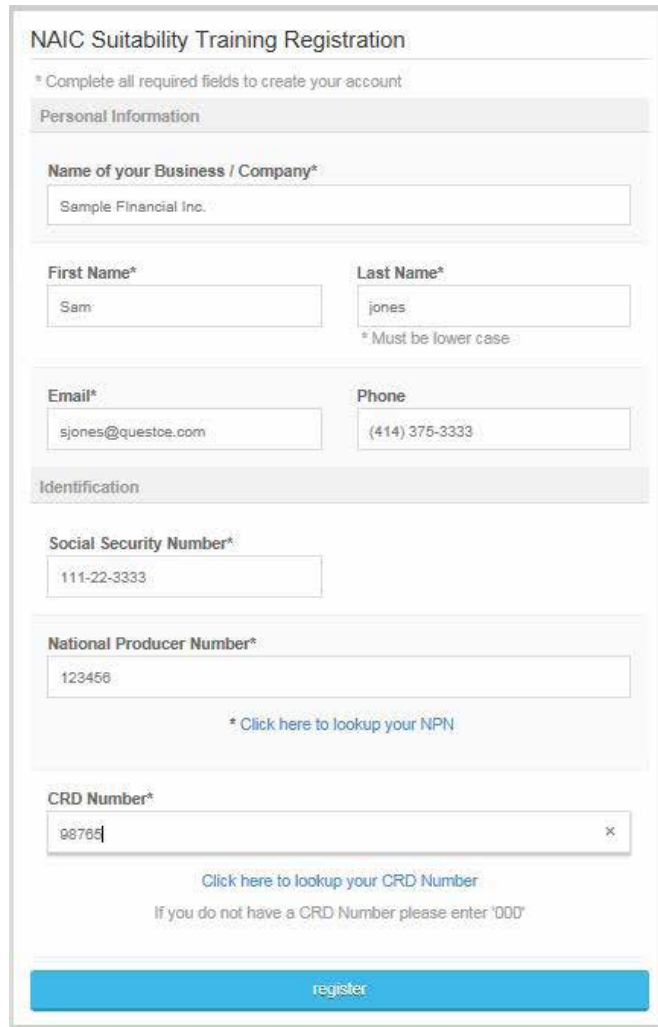
6. **Please Note:** If you click the **Add Product-Specific** tab and do not see the product training course you're looking for, you may need to return to your student dashboard page to verify your carrier(s) and broker dealer are properly selected in your account.
 - First, ensure you have the appropriate carrier(s) added to your account through the **Manage Appointments** tab on the side menu.
 - Also, verify that you have the appropriate broker dealer selected within your account settings through the **Broker Dealer** tab.
 - If you have the appropriate carrier(s) and broker dealer setting in your account, the proper product training courses will be available to you to select within the **Add Product-Specific** tab.
7. Once a course is added to your student dashboard page (homepage), click **Start** to access and work through the content portion of the course.
8. Once you have proceeded through all of the course content slides, click **Begin** (located under Exam) to open the course attestation or multiple choice exam.
9. Click **Start Exam** to answer a one-question attestation or multiple choice exam to mark the course fully Complete.
 - Your carrier(s) will be notified of any respective course completion(s) once the course status is 'Complete'.

Directions for new students: Registering/Creating a new account

1. On your internet browser, go to <https://learn.questce.com/naicsuitability/>.

The screenshot shows the Quest CE NAIC Annuity Training Portal. The header is red with the Quest CE logo and the tagline "THE NEXT GENERATION OF COMPLIANCE TRAINING SOLUTIONS". The main content area is white and features a "Welcome to Quest CE's NAIC Annuity Training Portal" section. Below this is a "The Power of Reciprocity" section and a "Regulations by State" section. The "Regulations by State" section includes a legend with four categories: "No Regulation" (white), "Pending Regulation" (light red), "NAIC Adopted Regulation" (red), and "State Specific Training" (dark red). A map of the United States is shown below the legend, with states colored according to these categories. The left sidebar contains a "Producers Login" section with fields for Social Security Number and Last Name, and a "GET STARTED IN 3 STEPS" section with three numbered steps. The right sidebar contains a "Participating Global Carriers" section with a list of carriers and a "CHAT WITH A REPRESENTATIVE" button.

2. Click **Register** to create your account.
3. Enter your information into the required fields to create your account. Click **Register** to proceed.
 - **Note:** If the NPN and CRD fields are not applicable to you, you can enter a 0 to proceed.



The image shows a registration form titled "NAIC Suitability Training Registration". At the top, it says "* Complete all required fields to create your account". The form is divided into sections: "Personal Information" and "Identification".

Personal Information

- Name of your Business / Company***: Sample Financial Inc.
- First Name***: Sam
- Last Name***: jones (with a note: "* Must be lower case")
- Email***: sjones@questoa.com
- Phone**: (414) 375-3333

Identification

- Social Security Number***: 111-22-3333
- National Producer Number***: 123456 (with a link: "* Click here to lookup your NPN")
- CRD Number***: 98765 (with a link: "Click here to lookup your CRD Number" and a note: "If you do not have a CRD Number please enter '000'")

At the bottom of the form is a blue button labeled "register".

4. You will be taken through a three-step registration process in order to select and begin your proper training. Click **Continue to Step 1**.

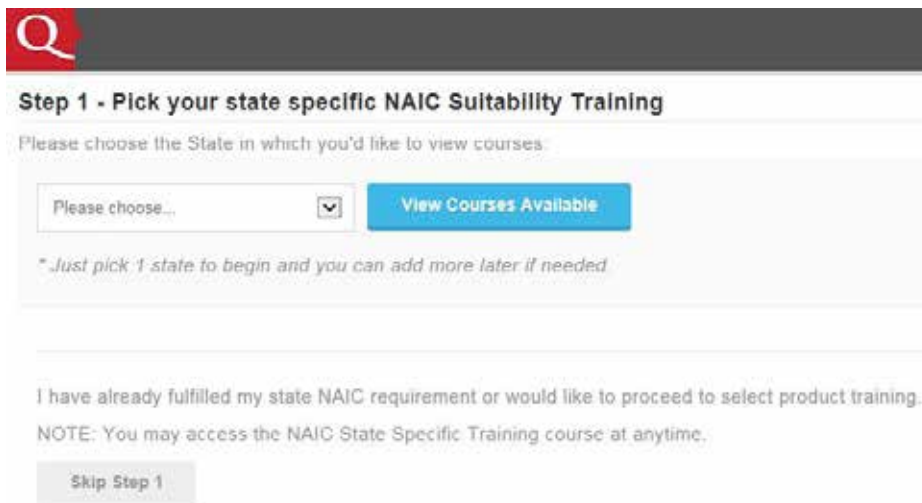


5. Registration Step 1: State Specific NAIC Annuity Suitability Training

- Follow the directions on the next page to help you select your State Specific NAIC Annuity Suitability Training.

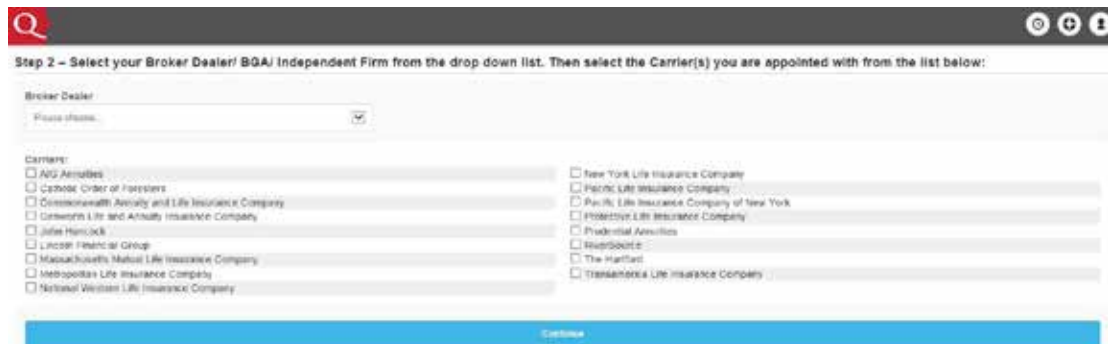


- **Note:** If you are only looking to take product-specific training (No State Annuity Training), select **Skip Step 1**, bypassing the State Annuity Course selection at this time.



6. Registration Step 2: Select your broker dealer, BGA or independent firm name from the drop-down list.

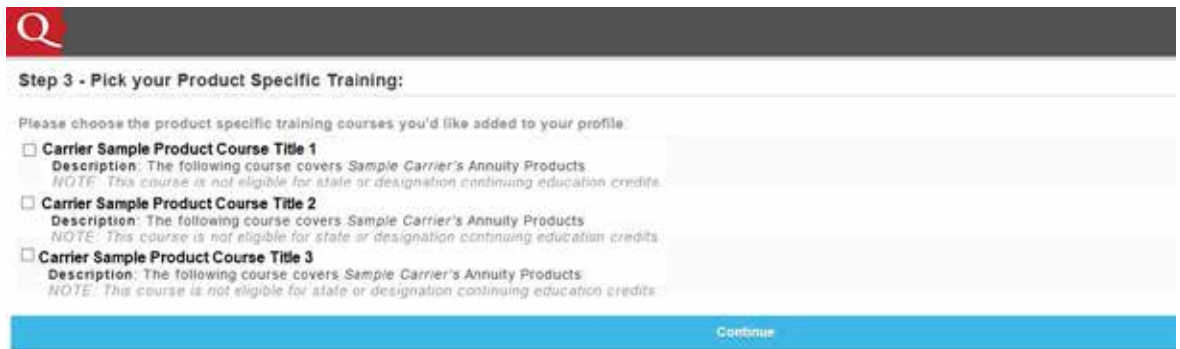
- Select the carrier(s) you are appointed with from the list below.
- Click **Continue** to proceed.



7. Registration Step 3: Select your appropriate product-specific training courses.

- Check the boxes for the product courses you wish to add to your account.
- Click **Select Courses** to proceed to your student dashboard page (homepage).

(Sample view below — courses listed will vary based on the Broker Dealer selected previously.)



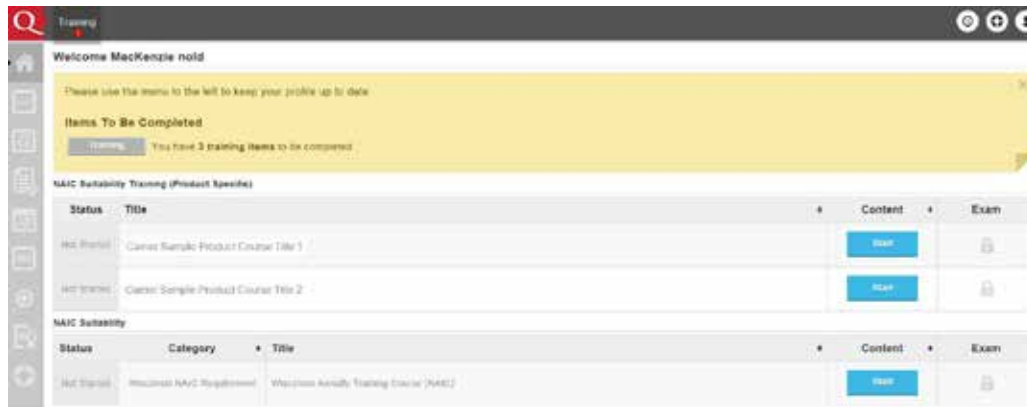
8. Personal Profile Security Setup (One-time requirement for all user accounts).

- Upon first login you will be prompted to create a secure profile by establishing three familiar security questions.
- Users who have already completed this secure account set-up process, will simply gain access to their account and will not be prompted to create and answer their account security questions again.





9. After the profile security questions you will land on your account dashboard page. The product-specific training course(s) you have selected, as well as any state annuity training course selected within the registration process, will be available for you to start and complete.
10. Click **Start** to access and work through the content portion of each course.



11. Once you have read and navigated through all content slides for a particular course, click **Begin** (located under Exam) to open the course attestation or exam. (Exams remain locked until you complete the content portion of a course first.)
12. Click **Start Exam** to answer a one-question attestation or multiple choice exam to mark the course fully Complete.

Please Note:

- You will not need to register fully the next time you access your NAIC training account. You will be able to simply log in to your existing account which you created.
- Your carrier(s) will be notified of any respective course completion(s) once the course status is '**Complete**'.

Guarantees are backed by the claims-paying ability of the issuing insurance company.

Smart step
 Make an annuity a part of the retirement journey

Annuities issued by American General Life Insurance Company (AGL) except in New York, where issued by The United States Life Insurance Company in the City of New York (US Life). Issuing companies AGL and US Life are responsible for financial obligations of insurance products and are members of American International Group, Inc. (AIG).

May not be available in all states and product features may vary by state. Please refer to your contract.

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