

NAIC Annuity Training

In order to sell annuity products, you may be required to take training.

1) Log in to State Life Training Portal

- a. Username is your NPN #
- b. Password is your last name (all lowercase) plus the last 4 digits of your NPN #

<https://naic.pinpointglobal.com/OneAmerica/Apps/default.aspx>



ONEAMERICA®

First time visitors
[Click here to register](#)

Returning users
Username:

Password:

[Log In](#)

[Forgot credentials?](#)

Your username will be your NPN#. [Click here to retrieve your NPN#](#)

Your password will be your last name (all lowercase) plus the last 4 digits of your NPN#. ex: John Smith with an NPN of 12345678 will have an initial password of smith5678.

Passwords can be changed upon access to the site.

Annuity Training and Certification

The companies of OneAmerica are providing its agents with a practical solution to meet requirements through this website.

Welcome to the OneAmerica companies' Annuity Training Program

This site provides you the opportunity to satisfy the training requirements necessary to sell OneAmerica products in compliance with state regulation. Through this site we offer both annuity product specific and credit hour general annuity training course (available at your expense). The companies of OneAmerica are completed prior to accepting any annuity business.

Why is Annuity Training Required?

In March 2010, the National Association of Insurance Commissioners (NAIC) adopted an amended Suitability Model Regulation (formerly the Consumer Protection in Annuity Transactions Model Regulation or the Suitability Transactions Model Regulation). The amended model regulation updates and revises previously established procedures for suitable individual annuity recommendations to help ensure that consumers' insurance interests are appropriately considered and protected. The definition of "Suitability Information" was expanded and requires a reasonable basis to determine that the recommendation to purchase, exchange or replace an annuity is appropriate, modify previously established methods to supervise recommendations. Perhaps one of the most significant changes to the model regulation was the addition of training and education requirements for the sale of annuities. This includes product-specific training which explains all material features of an insurer's annuity products AND a general annuity training/certification course PRIOR to the solicitation or sale of an annuity product.

Several states have adopted or proposed language from the 2010 Suitability in Annuity Transactions Model Regulation with state variations and existing state annuity training requirements that may require additional training and your state(s) specific laws or regulations.

State Specific Training

If your state requires producers to complete a one-time four hour annuity training course offered via Continuing Education vendors, you can attach the completion certificate to the training portal.

- 1) Select *View My State Specific Training* to attach 4 hour annuity CE certificate for annuity course previously completed



- a. Select Launch



- b. Complete fields regarding course found on completion certificate

Certificate Upload
Please browse your local file system for a certificate to upload.
You must also choose an approved CE vendor from the list below.

Valid file extensions are:

- Image GIF (.gif)
- Image JPG (.jpg)
- PDF (.pdf)

Certificate Date:
Must be in mm/dd/yyyy format.

Course ID:

Certification Training Provider:

State:

Credit Hours:

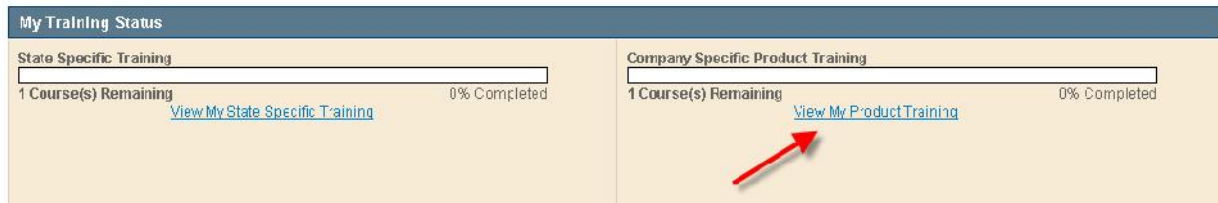
Valid file extensions are: PDF(.pdf), GIF(.gif), JPG(.jpg)

I attest that I have completed the CE course indicated and I am uploading a valid certificate.

1. Certificate Date
2. Course ID
3. Vendor
4. State
5. Credit Hours
6. Select Browse to select certificate saved on your PC
7. Select Submit

State Life Product Training

1) To complete the Sate Life product training select *View My Product Training* from Home page



The screenshot shows a 'My Training Status' section with two columns. The left column is titled 'State Specific Training' and shows '1 Course(s) Remaining' and '0% Completed' with a link 'View My State Specific Training'. The right column is titled 'Company Specific Product Training' and shows '1 Course(s) Remaining' and '0% Completed' with a link 'View My Product Training'. A red arrow points to the 'View My Product Training' link.

2) Select Launch.- Course will open in a separate window



The screenshot shows the OneAmerica website's 'My Training' page. On the left is a blue navigation menu with links: Home, My State Specific Training, My Product Training, and My Transcript. The main content area has a 'Welcome' message, a photo of three people, and a 'My Training' section with instructions. Below this is a 'Refresh' button and a blue header for 'OneAmerica Product Specific Training'. Underneath, there is a collapsed section for 'Care Solutions' with a 'click to expand or collapse' link. A red arrow points to the 'Care Solutions Training (12SLCS2)' entry, which has a 'Launch' link.

How to register for Online Services State Life / Care Solutions Producers

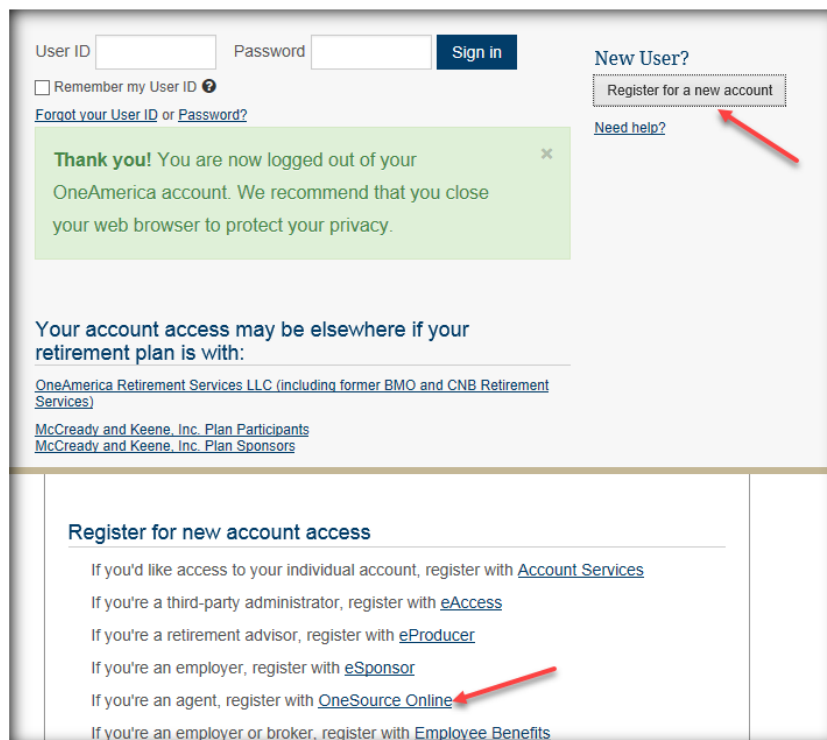
OneSource Online (OSO) can be used to:

- Track requirements on pending business
- View Inforce business
- Run Sales Connection – run illustrations or submit an eapp
- View commission statements
- Print Forms
- Sales Support
- View appointment status (My Business- My Profile)


To logon, go to Online Services- <https://www.oneamerica.com>

Select Register *for a new account* button


Click on “If you’re an agent, register with OneSource Online”



User ID Password

Remember my User ID 

[Forgot your User ID or Password?](#)

Thank you! You are now logged out of your OneAmerica account. We recommend that you close your web browser to protect your privacy. 

New User?

[Need help?](#)

Your account access may be elsewhere if your retirement plan is with:

[OneAmerica Retirement Services LLC \(including former BMO and CNB Retirement Services\)](#)

[McCready and Keene, Inc. Plan Participants](#)

[McCready and Keene, Inc. Plan Sponsors](#)

Register for new account access

If you'd like access to your individual account, register with [Account Services](#)

If you're a third-party administrator, register with [eAccess](#)

If you're a retirement advisor, register with [eProducer](#)

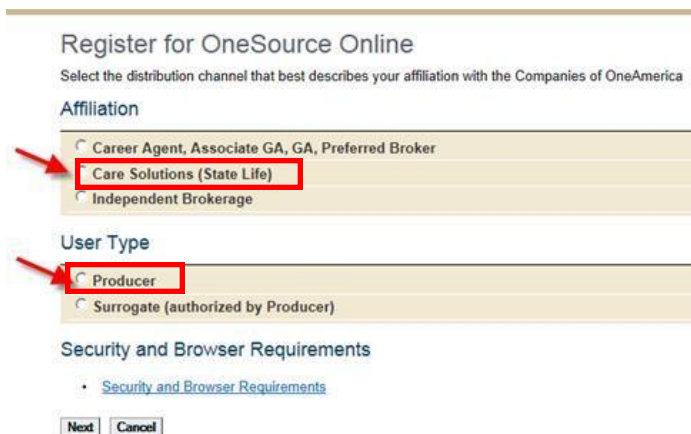
If you're an employer, register with [eSponsor](#)

If you're an agent, register with [OneSource Online](#)

If you're an employer or broker, register with [Employee Benefits](#)

Under *Select Company*, select **Care Solutions**

Under *Select User Type*, select **Producer**



Register for OneSource Online

Select the distribution channel that best describes your affiliation with the Companies of OneAmerica

Affiliation

Career Agent, Associate GA, GA, Preferred Broker

Care Solutions (State Life)

Independent Brokerage

User Type

Producer

Surrogate (authorized by Producer)

Security and Browser Requirements

• [Security and Browser Requirements](#)

Select Next

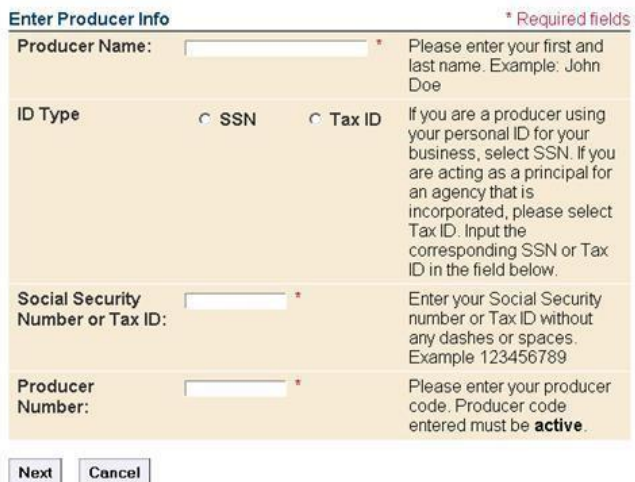
Enter First and Last Name

ID Type: Select SSN

Enter SSN

Enter State Life producer number from the approval email

Register for Online Services



Enter Producer Info * Required fields

Producer Name: * Please enter your first and last name. Example: John Doe

ID Type SSN Tax ID If you are a producer using your personal ID for your business, select SSN. If you are acting as a principal for an agency that is incorporated, please select Tax ID. Input the corresponding SSN or Tax ID in the field below.

Social Security Number or Tax ID: * Enter your Social Security number or Tax ID without any dashes or spaces. Example 123456789

Producer Number: * Please enter your producer code. Producer code entered must be **active**.

Select Next



OSO Care Solutions Producer Registration

Review the End User Licensing Agreements (EULAs):

Usage Agreement

Email Policy

Create User ID and Password

If you have any questions regarding Online Services, please call the Sales Desk at 800-275-5101