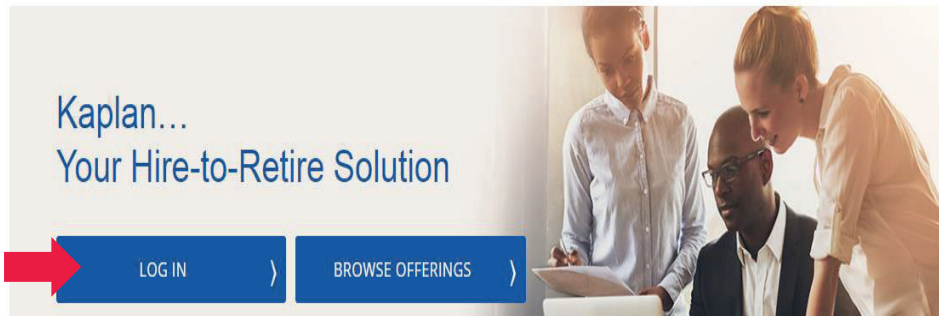


Kaplan Regulation 187 Registration site and talking points.

Kaplan website/URL

Please direct the producers to the following site:
<https://portal.kaplanfinancial.com/partner/AIGLIFE>



Click on the Login tab, in 1 of these 2 places.

-If a producer already has an account, enter Username and Password.

-If producer is new to the site, "Create An Account."

Login

Username or Email:

Password:

[Forgot username or password?](#)

LOG IN


[Don't have an account yet?](#)

CREATE AN ACCOUNT

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Creating An Account (Kaplan)

HOME BROWSE OFFERINGS FAQs CONTACT US  LOGIN

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Create a New Account

* Required

Personal Information

Please enter your full legal name as it appears on your ID.

First Name* ✓

Middle Name / Initial ✓

Last Name* ✓

Suffix

Email* ✓

Phone ✓

Account Information

Username* ✓


Password* ✓

Confirm Password* ✓

Other Information

NPN [I don't know my NPN number >>](#)

Broker Dealer*



Enter in all pertinent information to create a Kaplan account. Click “Create An Account” on the bottom to proceed.

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Kaplan Menu/Home Page

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Kaplan...
Your Hire-to-Retire Solution

ACCESS YOUR COURSES BROWSE OFFERINGS

Kaplan helps busy professionals obtain in-demand certifications and designations that enable them to advance and succeed in their careers. Through live and online instruction, we help our customers gain an edge in the following areas of study:

Select the “Browse Offerings” Tab in 1 of these 2 places.

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Kaplan Product Line Selection

HOME ACCESS YOUR COURSES BROWSE OFFERINGS FAQs CONTACT US

AIG KAPLAN FINANCIAL EDUCATION

Admin Order: 1 user Add Users

Select Product Line

Tab 1 Insurance Professional Development Tab 2

Insurance CE

Learn from courses written by industry experts as you satisfy your continuing education or annuities or long-term care training requirements and keep your license current.

CONTINUE

The user will land on the “Select Product Line” page.

The first tab – Insurance (CE) is where producers can take Best Interest Rule Training.

The second tab – Professional Development is where producers will go for our AIG product specific training.

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Kaplan Best Insurance Rule Training Selection (Tab 1)

Select Product Line

Insurance Professional Development

Insurance CE

Learn from courses written by industry experts as you satisfy your continuing education or annuities or long-term care training requirements and keep your license current.

CONTINUE ← 1

Product Selection / Insurance CE / Insurance CE / New York

Insurance CE NY CE Requirements

Please Note: A New York state-approved proctor must be present to monitor all continuing education examinations. The proctor may charge a fee for this service. Please see the State Requirements tab for additional information.

Provider Number NYPO-100095

Please Note: A New York state-approved proctor must be present to monitor all continuing education examinations. The proctor may charge a fee for this service. Please see the State Requirements tab for additional information.

Insurance CE Best Interests ← 2

Important Reminder: Your state does not permit a course to be repeated either within the same compliance/license renewal period or within a designated calendar time frame from the date last completed (e.g., a two year period, three year period, etc.). To assure receiving credit for this course, please review your records to confirm that this course qualifies for credit for your current compliance/license renewal period.

Individual Online Courses [Expand All] ADD 1 COURSE(S) TO CART ← 4

▼ Best Interests-Life Insurance ← 2

Product	Credit Types	Price	
New York Suitability and Best Interests in Life Insurance Transactions (11/47)	LA Life/Accident and Health Agents	4.00	\$0
	LB Life Brokers	4.00	
	C1 Life Consultants	4.00	
	LSB Life Settlement Brokers	4.00	
	Eligible CFP® CE	2.50	
Res/Non-Res NY Producer Course: NY Suitability and Best Interests in Life Insurance Transactions	Best Interests	0.00	\$0

3

SELECTED

#1. Click “Continue” to go to the Best Interest Rule Training.

#2. Producer can choose to click “Best Interest” Tab or click the Best Interest drop down arrow.

#3. We are required to offer 2 types of Rule Training. The 1st course is if the producer wants CE credit that requires an outside Testing Proctor and additional cost.

***Select the 2nd course if you do not require CE credit.** (The testing is shorter on the 2nd course). This testing does NOT require a NY proctor.**

#4. Once selected, the course is added to your cart.

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Kaplan Professional Development/ Product Training Selection Tab

Select Product Line

Insurance Professional Development

Best Interests Product Training

Get our carrier-required best interests product training.



CONTINUE

1

#1. Click the Professional Development tab for **Product Training**. (Click continue tab).

#2. Select your courses

Best Interests Product Training

Best Interests Product Training

Effective 8/1/19, producers may not solicit the sale of an **annuity** product in New York without adequate knowledge of the product in order to act in the best interests of the client. Effective 2/1/2020, producers may not solicit the sale of a life insurance product in New York without adequate knowledge of the product in order to act in the best interests of the client.

The following product-specific best interest training courses are supplied by the indicated carriers to enable you to meet this requirement. You are required to complete a product-specific training course for each annuity or **life insurance** product you intend to sell.

3

ADD 6 COURSE(S) TO CART

AIG

AIG Index Universal Life Products

\$0

✓ SELECTED

AIG Introduction to Our Products

\$0

✓ SELECTED

AIG Reason for Insurance

\$0

✓ SELECTED

AIG Secure Lifetime GUL 3

\$0

✓ SELECTED

AIG Select-a-Term

\$0

✓ SELECTED

AIG Term Conversion Products

\$0

✓ SELECTED

Select your courses

2

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Kaplan Checkout/Review Your Order

Review Your Order

Petruzzelli, Nicholas		Nicholas.Petruzzelli@aig.com	PtrN3296748	X
X	PD_BI AIG Index Universal Life Products		1	\$0
X	PD_BI AIG Introduction to Our Products		1	\$0
X	PD_BI AIG Reason for Insurance		1	\$0
X	PD_BI AIG Secure Lifetime GUL3		1	\$0
X	PD_BI AIG Select-a-Term		1	\$0
X	PD_BI AIG Term Conversion Products		1	\$0
				Subtotal: \$0

[Modify All Options](#) [CONTINUE SHOPPING](#) [PROCEED TO CHECKOUT](#)



Requirements and Information

NEW YORK CONTINUING EDUCATION COMPLETION INSTRUCTIONS

YOU MAY NOT RECEIVE STATE CREDIT FOR THIS COURSE

Your state does not permit a course to be repeated. To assure receiving credit for this course, please review your records to confirm that you have not taken this course in any of your prior compliance/license renewal periods.

IMPORTANT! You may have additional steps to complete after your course is done to report your completion appropriately. Make sure to follow these steps after you have completed your course and exam to ensure you have met all reporting requirements.

1. After completing the final exam, click on View Certificate on your course Dashboard.
2. On the right side of your certificate page, you will see a section called Additional Reporting Options. Click Continue.
3. If you would like CFP continuing education credit, click the box next to CFP CE. Click Next.
4. If you have additional carrier reporting requirements, select them on Carrier screen and click Next.
5. Fill in the required identifiers, including your Social Security number, if requested. Click Submit.

You must navigate to the end to Submit to report to all desired organizations. Failure to complete these steps after completing the exam will prevent your completion from reporting.

This document contains state-specific information. Please read the entire document prior to beginning your course. It is important to ensure all completion requirements are met, including completion and submission of any required forms, in order to complete your continuing education requirements.

This information includes the following:

1. Complete Your Online Course
2. Complete Your Final Certification Exam
3. State-Specific Information
4. Accessing your Course Completion Certificate
5. How to Contact Us

[CONTINUE](#) ←

Kaplan will request that you confirm your order. (click Proceed to Checkout).

Kaplan will then give instructions about the courses. It also includes how the completions work and what the state guidelines are.

Click “continue” at the bottom of the screen.

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Kaplan Shipping Information (Screen)

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Select Shipping Information

Shipping Policy | [Learn More](#)

- Due to tax regulations and certificate compliance rules we are required to have a delivery address on file for all orders. This includes those orders with online-only products in them.
- We do not ship to P.O. boxes.

Names	Ship to	Shipping Address	Shipping Method
Petruzzelli, Nicholas	<input type="text" value="Nicholas Petruzzelli"/>	<input type="text" value="New address"/> <input type="text" value="Address 1 / Street Address"/> <input type="text" value="Address 2 / Apt Number / Suite Number"/> <input type="text" value="Address 3"/> <input type="text" value="Company Name"/> <input type="text" value="City"/> <input type="text" value="United States"/> <input type="text" value="Choose"/> <input type="text" value="Zip / Postal code"/>	

Please Note: (Nothing is going to be shipped). Kaplan requires an address for certain regulations and completion certificates. Click "Save" when completed.

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Kaplan Payment Summary

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View Order Summary

Payment Summary

You Pay	\$0
Shipping & Handling	\$0
Estimated Tax	\$0
Order Total	\$0

Enter Additional Information

Cost Center Code:

Purchase Order ID:

Processing may take a moment, thank you for your patience.

[Refund / Cancellation / Product Return Policy](#)

EDIT ORDER PLACE ORDER

As you can see on the Payment Summary, there is \$0 due. Click the green "Place Order" tab

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Kaplan Course Confirmation

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Order Complete

Confirmation Number: **21420168**
Thank you for ordering our products. Please print this page for your records.

Billing Summary

You Pay	\$0
Shipping & Handling	\$0
Estimated Tax	\$0
Order Total	\$0

Order Summary

Petruzzelli, Nicholas	nicholas.petruzzelli@aig.com	Nickpetru
-----------------------	------------------------------	-----------

Shipping Address:
Nicholas Petruzzelli
AIG
340 Seven Springs Way
Ste 100
Brentwood, TN 37027-5697
US

Insurance CE	1	\$0
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New York Suitability and Best Interests in Life Insurance and Annuity Transactions (for NY credit)

[Refund / Cancellation / Product Return Policy](#)

See our website for product availability.

PLACE NEW ORDER

PORTAL HOME

Producers can now go to the “Portal Home” to view their ordered course and complete the course. The producer will receive email confirmation of order.

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Accessing and starting the Kaplan Course

The screenshot shows the Kaplan Financial Education portal. At the top, a navigation bar includes 'HOME', 'ACCESS YOUR COURSES', 'CONTACT US', and a 'LOGOUT' button. A red arrow points to the 'ACCESS YOUR COURSES' tab. Below the navigation bar is a sidebar with 'Menu', 'ONLINE ACCESS' (Portal Home, myAccount), and 'PORTAL TOOLS' (FAQs, Contact Us). The main content area features a banner for 'Kaplan... Your Hire-to-Retire Solution' with a 'KAPLAN FINANCIAL EDUCATION' logo and a 'KAPLAN' logo. A red arrow points to the 'ACCESS YOUR COURSES' button in the banner. Below the banner is a blue bar with the text 'Welcome Nicholas Petruzzelli' and 'Select an Enrollment'. A list of courses is displayed below, each with a circular icon and a title:

- Resident and Non-Resident NY Producer Course: NY Suitability and Best Interests in Life Insurance Transactions (not for CE)
Organization: New York | Access Ends On: December 19, 2020
- AIG Introduction to Our Products
Access Ends On: December 10, 2020
- AIG Select-a-Term
Access Ends On: December 10, 2020
- AIG Secure Lifetime GUL 3
Access Ends On: December 10, 2020

Producers can then access their course on the Portal Home on the “Access Your Courses” Tab.

Producers will land on their enrolled courses. Click on the **blue** titled course to launch and complete.

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Nashville, TN