POST- LICENSING INSTRUCTIONS NY RESIDENTS

1

Check your license:

The license takes approximately 24-48 hours to show on the website.

Go to www.dfs.ny.gov

- > On the left menu, click on Application and Licensing
- > Click on Insurance Agents & Brokers
- > Under licensing click on Original License: Resident
- Go all the way to the bottom and click on Original License Application
- Fill out the information. This step will be \$40, this is to request your license number.

KEY NOTES

- 1. In LICENSE SECTION make sure you choose LIFE AGENT (OR LA) only. Do not choose LIFE BROKER(OR LB)
- 2. Do not upload any files in the FILE UPLOAD section
- 3. For the section that ask about appointments, click next as you will have no appintments
- 4. Continue completing the application until you have completed all sections.





representative offices of foreign banks. Corporations: Approval of the Superintendent to use certain words in the title of a corporation.



Licensed Financial Services: Budget planners, check cashers, licensed lenders, money transmitters, premium finance agencies, and sales finance companies

Insurance - Application Forms for Public Use

Not Yet Available

Must be registered with the Financial Industry Regulatory Authority (FINRA) and must furnish the FINRA CRD number

Printing a License

The Department no longer automatically mails paper licenses. Licenses are generated in PDF format. Applicant should print a license as soon as it is issued, by accessing the Electronic License Request. To log in, the license number is required.

Use our **Producer/Licensee Search** to determine if the license has been issued and to view the license number. Once a license has been printed once, there is a \$15.00 duplicate license fee for any future printing requests.

NOTES:

- To access Licensing applications, please use one of the following supported browsers: Internet Explorer 7 or higher; Firefox 24 or higher; Google Chrome 33, or Safari 5.1.5 or higher.
- Disable any "Pop-up Blocker" setting in your browser before using this Application.
- The application may be unavailable daily from 7:30am to 7:45am for regularly scheduled maintenance.
- For security and identification purposes, a bar code has been added to all licenses.



Contact Us

On each page of the online application, here is a 7 symbol that, when selected, provides more information pertaining to that page of the application. Please read all instructions carefully. If you are experiencing technical problems using this application or need additional assistance, email the Licensing Boreau at **licensing@dfs.my.gov**.



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 In the Scarch By field choose other Individual or Business E stal Bity Companies. 	noty, TBA licenses (transacting business ap) are included in th	to Business Entity search along with Corporations, Partnerships, and Lim
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Click on the HELP button for additional instructions.		
. Do not use the Back Button. Use either the Reset Button of	r Producer Gearth Link.	
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	FIND YOUR
LICEN	SE NUMBER

- Go to www.dfs.ny.gov
 - Insurance Industry-
 - Agents & Brokers -
 - > Other Services-
- Producer/License Search -
- Enter the value code that they show you in the screen-
- (It is different every time you enter) remember it is case sensitive.-
- Type the last name, and first name, of the agent who's license you are looking up.-
- Locate the person's name and write down the license number, as you will need it.

3

PRINT YOUR LICENSE

- Return to home page www.dfs.ny.gov
- Insurance Industry
- Agents & Brokers
- Licensing
- Scroll down and select Print a License Online (Electronic License Request)
- Read the content, and click on ELECTRONIC LICENSE REQUEST at the bottom of the page.
- Follow the instructions in how to create a username and password.
- Licensees (agents) Username is the numeric portion of your New York Insurance license.
- Your Password is the last 4-digits of your SSN and your 8-digit date of birth in (MMDDYYYY) format.
- Example SSN 432-98-1234, DOB 08/26/45= 123408261945
- Once logged In click on the printer icon under the words Print License for the class LA license
- Save license in PDF format

*** Please Remember to add your License # to the Launch System



- Title Insurance Agent Licensing FAQs
- Add A Line Application for Existing Individual/TBA Agents and Brokers
- Title Insurance Agent Licensing Information
- Applying for a Broker/Agent License
- Licensing Applications, Forms & Exam Requirements
- Original License: Resident | Non-Resident
- Relicense Applications (Individual and TBA only)
 Renewal of License (Individuals/TBA/Entity)
- Print a License Online (Electronic License Request)
- Address Change Request Application for Consent to Engage in the Business of
- Application for Consent to Engage in the Business of Insurance Pursuant to 18 USC 1033 and 1034
- Company Appointment/Termination (to be completed by

- Continuing Education Course Search (Portal)
- Continuing Education Provider Search (Portal)
- Continuing Education Program (for CE Providers)
- CE Provider Electronic Reporting System
- Flood Insurance Training Requirements
 - Exam Vendor Information
 - Exam Monitor Search (Portal)
 PreLicensing Education Program
 - Prelicensing Provider/Course Search (Portal)
 - Annuity Transactions Training Requirements

New York State of Health Marketplace

- New York State of Health Certification Information
- New York State of Health Certification Courses

Electronic License Request

NOTES

- To access Licensing applications, please use one of the following supported browsers: Internet Explorer 7 or higher; Firefox 24 or higher; Google Chrome 33, or Safari 5.1.5 or higher.
- Disable any "Pop-up Blocker" settings in your browser before using this application.
- This application may be unavailable daily from 7:30am to 7:45am for regularly scheduled maintenance.

For security and identification purposes, a bar code has been added to all licenses.

Electronic License Request and electronic Duplicate License Request on available to Service Contract Registrants, Life Settlement Providers, or Life Settlement Intermediaries.

Access the Application

Electronic License Request



Education Providens - Login using username and password create: during registration.



NYDFS Regulation 187:

Training Required for NY Agents



Effective August 1, to sell any annuity products in New York, World Financial Group Insurance Agency, Inc. (WFGIA) life licensed agents and Transamerica Financial Advisors, Inc. (TFA) securities-registered representatives are required to take a state-required training course prior to submitting any fixed and/or variable annuity applications.

While there are multiple vendors offering courses accepted by the state of New York, we have confirmed with Crump that the **RegEd NY Reg 187: Suitability and Best Interest of Clients in Life Insurance and Annuity Transactions (484_NY) course** will be accepted by all WFG platinum providers to meet the state requirement. You can sign up for the training at the RegEd website:<u>https://secure.reged.com/TrainingPlatform/</u>The training course is free, however you can receive CE credit for it by paying a \$5 fee.

Login to RegEd:

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

AINING PLATFORM »	RULES AND REGULATIONS	News	CONTACT US	About Us
Welcome to experience our rea	the industry's largest and m I-time reciprocity and requir	ost comprehensive rements tracking ei	e annuities training plat ngine and meet your tra	form. Log in now to ining requirements today.
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Jackson National Life Insurance Company				create a profile.
Jefferson National ife Insurance Company				 Complete your state-mandated annuity training.
iberty Life Assurance Company of Boston				3. Complete Carrier- specific courses as they are assigned to you.
Lincoln National Life				
lass Mutual Financial Group	Click	to enable Adobe Flash	n Player	Other Available
Midland National Life Insurance Company				News
Mutual of Omaha				 RegEd Named Best Mid- Size Technology Company by the North Carolina Technology Association
Financial Services				StonePiver Pick and
Click base for a full list	Adopted Require	ement 🔳 Requireme Requirements Pending	ent Pending Adoption Adoption	Compliance Acquires Compliance Assurance Corporation
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				21 Awards

Select "Suitability Training" from the menu on the left

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 Optional Insurance CE 	New Jersey	No	Yes		O View My Courses
	Pennsylvania	No	Yes		O View My Courses
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Click on "Proceed"



Select CE or "No" CE Credits



Insurance and/or Professional Designation CE Options

Do you want to receive Insurance and/or Professional Designation CE Credits?

 ${\textcircled{o}}$ I want to receive Insurance and/or Professional Designation CE Credits ${\textcircled{o}}$ I DO NOT want to receive Insurance and/or Professional Designation CE Credits

Too NoT want to receive insurance and/or Professional Designation CE C

<u>Warning!</u> Ordering CE after the course is completed is NOT allowed for most states.

O Proceed

Enter the Course Code: Training #1: 484_NY Training #2: 485_NY

RegEd	
● Select Your License ② Choose Courses / CE »	Place Your Order
Available Courses and CE Credit	
To receive credit you must select Add for the credits d approved for that state or professional designation. To	esired. If no credits appear, the courses you have comp review your completed order, select Proceed.
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Select the Course

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Submit the Course Order

RegEd				
● Select Your License ● Choose Courses / CE ● Place Your Order ≫				
Enter Payment Information				
Please verify your order below. To add more courses or credits, select the Add More Courses and CE Credits button below.				
When you have verified your order, select the Submit Your Order button below.				
O Add More Courses and CE Credits				
III:::: NY Reg 187: Suitability and Best Interest of Clients in Life Insurance and Annuity Transactions (484_NY) 🕥	Credits	Course Rating	Item Price	Remove Item \$0.00 O Remove
			Grand Total:	\$0.00
Submit Your Order O Cancel Your Order ADOUT SIX CENTRICATES				

Activate the Course

RegEd	
My Courses Active Courses Course History	
Order Instructions:	
To order new courses or additional CE credits, please click the Select New Courses and CE Credit button to view the courses and CE credits available to you.	
To access a course that has already been ordered, please select the corresponding Go To Course button below.	
Before you take the exam, please check the pop-up blocker in your browser and ensure this website is allowed, otherwise you may experience problems completing the example of the example	m.
Select New Courses and CE Credit O Order Additional Insurance Credit	
Course Name Course or Professional Designation CE Status Course State	tus

Begin the Course

Begining Feb 1st, 2020 product training

is required before solicitation

Below you will find some of the most popular products sold and where to find them on the RegEd Site

Product Name	RegEd Product Code	Reg Ed Assignment ID	Available on Reg Ed
Nationwide - YourLife Guaranteed Level	YourLife GL Term	YLGLTerm	Yes - 12/11/19
Nationwide - YourLife Simplified WL 120	YourLife Simplified WL	YLSimpWL	Yes - 12/11/19
Nationwide - YourLife Whole Life 100 - 20 Pay Whole Life	YourLife Whole Life 100-20-Pay	YLWL100-20	Yes - 12/11/19
Nationwide YourLife CareMatters -NY	YourLife CareMatters NY	YLCMNY	Yes - 12/11/19
Nationwide YourLife Indexed UL Protector - New York	YourLife Indexed UL Prot	Protector	Yes - 1/7/2020
Nationwide YourLife Indexed UL Accumulator - New York	YourLife Indexed UL Accum	Accumulatr	Yes - 1/7/2020
Nationwide No-Lapse Guarantee UL II	No Lapse Guar UL II	NLG UL II	Yes - 1/7/2020
Course Name	Course #	Product Code	Vendor
Transamerica - Final Expense Portfolio Training	19TL_01	TLFINALEXP	RegEd
Transamerica - Financial Foundation IUL	19TL_02	TLFFIUL	RegEd

RegEd					
☆ Home	Produce	r Status			
 Producer Status 	Annuitie	es State Suitabilit	y Compliance Summary		
IIII Enter Product Code	State	Resident?	Requirement Met? 🕝		Course Status
🚌 State Suitability Training	Illinois	Yes	No		O Go to Course
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	Although Re their produc	gEd, Inc. takes reas t training and contin	onable steps to ensure that th uing education requirements a	e information disp and status on the	layed through the Annuities Training Platfor websites of the state departments of insura

Start the Course!

Good Luck!

6 Launch System – Post Licensed

Go to:http://registration.wfglaunch.com/

#1

Enter your Producer License Number







#2

Sign up for Access Pass ***This step is MANDATOY for ALL AGENTS*** in the Fradel Barber Hierarchy



How to Sign Up for Recurring Access Pass Payments Subscribe and Save the Monthly \$10 Administrative Fee

Log into MyWFG.com

HC.

• Navigate to Payment Central: Menu > Administration > Payment Central

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	MENU			
	Home		Administration	1.10
- 16	Events & Recognition	>	WFGIA Compliance Information >	
	Licensing & Appointments		About WFG >	1
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237	Administration	э	Manuals & User Guides >	1 all
	TFA	2	WFG Forms	410

- Click the "Access Pass" button at the top of the page
- Click "Authorize and Add to Cart"

	Online Payment History (80 days): No Payment History Available	> No items in the shopping cart.
Access Pass		+
Access Pass Balan	ce	
If you have just paid your A	ccess Pass balance, you may need to wait for 10 minutes before signing up	for recurring Access Pass payments.
Balance Due: \$0.00		
By clicking Authorize and Ai related entities to charge yo Due. You acknowledge that these varying monthly paym	dd to Cart, you authorize World Financial Group, Inc. and/or World Financ our credit or debit card (or any other card yeu may provide WFGIA from ti the monthly Balance Due may vary. The Access Pass includes your E&O nents.	ial Group Insurance Agency. Inc. (WFGIA) and ime to time) each month for the monthly Balance insurance premiums and other fees. You authorize
Additional information, deta to you with a confirmation n be available from your card authorization applies only to you must unsubscribe from to a confix you halange you way you	ails and the fee schedule are available on the Access Pass page. A confirm number and, if you need a copy, one can be provided to you upon request issuer. You have the right to cancel this authorization at any time and aci o the method of payment and does not affect or have any bearing on you recurring fees should you need to change your card information, and yo re charged in error, if you would like to cancel this authorization or if you	mation of each monthly transaction will be emailed t. Information concerning the transaction may also knowledge that cancelling this payment ur payment obligations to WFGIA. Please note that ou may be charged a \$10 administrative fee if you need more information, please submit a support
case by clicking on the HEL	P icon at the bottom of the page.	

• Click "View Cart" then click "Continue"

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		Total Amount:	\$0.00
ther Payments			Continue
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• Click "Pay Now" (Authorization Required, You Will be Taken to a PayPal Portal if Your Credit/Debit Card Information is Not on File)

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I ITEM IN CART	
PAYMENT TYPE	AMOUNT
Access Pass Recurring Authorization	\$0.00 "WFG uses \$1 to preauthorize and setup recurring payments. You will not be charged the \$1, so the cart shows \$0 for this setup.
īotal Amount	\$1.00
Edit Cart Pa	y Now

By clicking on "Authorize and Add to Cart", you authorize World Financial Group, Inc. and/or World Financial Group Insurance Agency, Inc. (WFGIA) and related entities to charge your credit or debit card (or any other card you may provide WFGIA from time to time) each monthly Balance Due, You acknowledge that the monthly Balance Due may vary. The Access Pass includes your E&O insurance premiums and other fees. You authorize these varying monthly payments.

Additional information, details and the fee schedule are available on the Access Pass page on MyWFG.com. A confirmation of each monthly transaction will be emailed to you with a confirmation number and, if you need a copy, one can be provided to you upon request. Information concerning the transaction may also be available from your card issuer. You have the right to cancel this authorization at any time and acknowledge that cancelling this payment authorization applies only to the method of payment and does not affect or have any bearing on your payment obligations to WFGIA. Please note that you must unsubscribe from recurring fees should you need to change your card information, and you may be charged a \$10 administrative fee if you do so. If you believe you were charged in error, if you would like to cancel this authorization or if you need more information, please submit a support case by clicking on the HELP icon at the bottom of the page on MyWFG.

Apply for your E&O Insurance (Errors & Omissions) NAPA



	Need Help? Have Questions'			Truste	d Ben	efits Pro	ovider	Sind	e 198
VADA J	LET'S CHAT	Home	Eerefits+	(Went To -	Articles	Get Social ~	About M	Contr	ct Loại
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http://www.napa-benefits.org/nd/errors-and-omissions

➤ Click on APPLY NOW!

> Create a new customer registration with new username and password, Continue.

> Enter your personal details, Continue.

> Enter additional information such as; ss number, DOB, Date of licensure, and license

number. Continue

Select all 5 warranties & agreements, Click on Confirm Eligibility.

Choose policy effective date ex: 10/01/2016 (This will be the 1st day your E&O insurance is

enforced), Continue.

Select Newly licensed L&H agent. Continue.

Answer all claims, complaints & disciplinary questions with Yes or No. Continue.

Confirm your annual revenue. (Should show \$0-\$100,000 revenues), Continue.

Confirm your coverage limits. (Should show \$1 million per claim / \$1 million annual

aggregate) Continue.

Select Option A: (Life, accident, health, LTC, disability, including Medicare Advantage &

Medicare Supplements, employee benefit administration) Continue.

> Scroll to the end of the page and select I ACCEPT all representations, warranties and

agreements. Continue.

Payment Options:

> 1. Pay in full \$374.00 (save \$60.00),

> 2. Down payment due immediately of \$111.37 and 11 monthly installment payments of \$29.33. Continue to checkout.

➢ -Enter payment information all Debit, Credit and EFT accepted. APPLY NOW.

Complete Mandatory Online Courses

Home		Licensing & Appointments		State Licensing Information	
Events & Recognition	×	Licensing	3	Hot States	
Licensing & Appointments	x	Appointments	÷.	Licensing Reports	d.
Recruiting & Selling	2	TFA Licensing	ž	Pre-licensing Education	
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KAPLAN) INDIA	Vordi Financial Group has arranged specifically with Kaplan Financial to deliver our required AML course. In addition. they offer: 1 Total Access CE funtimited CEI for just \$20.00 more than the cost of your AML	Sector Addition & Company	Since 1979, A.D. Banker & Compai committed to student satisfaction relevant. Informative and educatio guarantee success. A nabiomwide I with courses, taught when and wh highly qualified instructors and bu the A.D. Banker solution and what
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Go to www.mywfg.com.

Click on Menu

Select Licensing & Appointments > Licensing > Continuing Education

 Scroll to bottom of page and click Anti-Money Laundering (AML)

Click here to continue

- Scroll down to 2017 AML I \$9.95
- Choose state (New York) on the drop down menu
 Click on Non-Credit Click here to Enroll.
- Add to Cart > Proceed to check out > Proceed to check out (again) > Continue > Place order.
- Make payment with any debit or credit card > Pay & go back to home page > Click on Access your courses.
- Complete all courses and short quizzes, once done you will generate a certificate that will automatically go to WFG for update but save a PDF copy for your records.

Make sure you submit a copy of your LICENSE, AML CERTIFICATE AND E & O CERTIFICATE OF INSURANCE TO wfglicenseapps@transamerica.com

FOR NY RESIDENT ONLY

Get appointed with insurance companies (ONLINE):

- -Go to mywfg.com
- -Click on MENU
- Select Licensing & appointments > appointments > Carrier appointments.
- Life & Disability Insurance
- -New York Life & Disability Carriers
- Please complete all individual appointments listed:
- Transamerica Financial Life Insurance Company (TFLIC) (P00203)
- Nationwide (PM0100) (Remember to complete the 3 mandatory courses)
 Nationwide's Business Practices and Compliance Guide
 Nationwide's Anti-Money Laundering Training
 How to Do Business with Nationwide Life
 • Go to
- Pacific Life (P00127)
- VOYA (P00362).

ii NOTE: PLEASE MAKE SURE YOU SUBMIT A HYPPA FORM FOR APPLICATIONS SUBMITTED WITH ANY ROVIDER WHICH REQUEST LTC COURSE !!



Your appointment status should be updated in 24-72 hrs.

How to check if it's been updated:

- Go to Menu > Commission & Reports > Run a Report.
- Scroll down to Licenses & appointments > Generate Report
- A list of all your appointments, licenses, Education courses will come up. If it's not there, it has not been updated in the WFG system.