Utilizing the NAIC Training Portal for New Users

By registering for Quest CE's NAIC Suitability portal, new users will be able to access and complete annuity and product-specific training materials.

See below for detailed instructions on how to login and navigate the NAIC training portal.

How to Utilize the NAIC Training Portal:

Step 1: In your internet browser's address bar, type in **https://learn.questce.com/naicsuitability/**

> ** Note: From here, you can review each state's specific requirements by scrolling down to the **Regulations by State** section and clicking the map.*

Step 2: Next, click **Register Now** or click the blue   **Producer Registration** icon in the center to create your account.

Step 3: From here, enter your information into the required fields to create your account. Then, click Register to proceed. Required fields include:

- **Name of your Business\Company**
- **First Name**
- **Last Name**
- **Phone Number**
- **Email Address:** Your Email Address will be used as your **Username** for your NAIC user profile and must be a unique Email Address not utilized by others within the NAIC portal.
- **Password & Confirmed Password:** You will create your own secure user password that meets the minimum password requirements of at least 8 total characters, one number, one Capital letter and one special character. For example, passWord#6 meets these secure password requirements.
- **SSN:** SSNs are encrypted and therefore are not visible to Quest CE. SSN is required for DTCC Data feed transitions of completion records to respective BD/Carriers on back end.
- **NPN:** If the NPN field is not applicable to you, you may enter 000 to proceed.
- **CRD:** If the CRD # field is not applicable to you, you may 000 to proceed.

Step 4: Once you click **Register**, you will be taken through a three step registration process in order to select and begin your proper training. Click **Continue to Step 1.**

Step 5: Pick your State-Mandated Annuity Suitability Training

- From here, you can elect to do any of the following:
  - **State Training + CE Credit:** Choose this option to satisfy your State-Specific Annuity Suitability Training requirements in addition to completing Insurance CE training for state CE credit.
  - **State Training Only (Non-CE Credit):** Choose this option to only take the State-Specific Annuity Suitability Training
  - Or, you can elect to **Skip Step #1** to bypass the State-Specific Suitability Training selection and begin the product-specific selection process.

Step 6-a.

If you elected to complete Insurance CE credit in addition to your suitability training, you will be asked to **Pick your state-specific NAIC Suitability Training,** next.

- To do this, click the drop-down menu to choose the State in which you'd like to view training courses. Click **View Available Trainings** to continue.

  ** You also have the option to Skip this Step. In this case, you will be taken to **Step 2** of the registration process (Select your Broker Dealer/BGA/Independent Firm).*

- Next, check the box to select the state-specific course and click Select Courses to continue to the payment form.
- The identifying form fields should be automatically filled in, but you will need to enter your payment information to complete your purchase. Click **Send Payment** to continue.

Step 6-b.

If you elected to complete State Training Only, you will be prompted to Pick your state-specific NAIC Suitability Training by choosing the appropriate option from the drop-down menu and clicking View Courses Available.

** You also have the option to **Skip Step 1** if you have already fulfilled your state NAIC requirement you would simply like to proceed to select product training.*

Step 6-c.

If at any point you elected to skip a step to go directly to the product training section, you will be taken to **Step 2**: *Select your Broker Dealer, BGA or Independent Firm Name.*

To do this, click the drop-down menu and select your Broker Dealer. Then select the *Carrier(s)* you are appointed with from the list below. Click **Continue** to procced.

Next, select the product-specific training courses you'd like added to your account and click **Select Courses** to continue to add the courses and return to your training dashboard.

> *Please Note: As this is your first time logging into the NAIC portal, you will be prompted to select and answer three personal profile security setup questions.*

Step 7: 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.

Step 8: Click **Start** to access and work through the content portion of each course.

Step 9: 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.

> ** Note: Exams will remain locked until you complete the content portion of a course first)*

Step 10: **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 simply login to your existing account using the email and password you provided during the registration process.*
> - *Your Carrier(s) will be notified of any respective course completion(s) once the course status is 'Complete'.*