

# Principal® annuities NAIC product training via RegEd



A majority of states require you to complete carrier-specific annuity product training courses, and/or a general annuity training course, prior to soliciting annuity sales in those states.

Principal uses RegEd as their preferred platform. These instructions can help you access the training you need to sell our products.

**Even if you've already completed product training for Principal on a previous training platform, we encourage you to log into RegEd to verify that all of your training certifications have been successfully transferred.** It could take up to 24 hours for transferred certifications to appear on the RegEd platform.

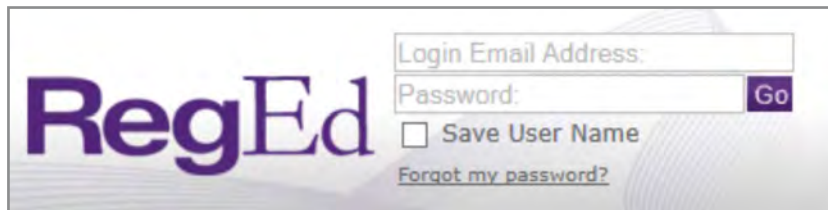
[Go to the RegEd training website](https://secure.reged.com/TrainingPlatform/)

(<https://secure.reged.com/TrainingPlatform/>)

**Continue reading to learn how to access training through RegEd.**

## If you're already registered with RegEd

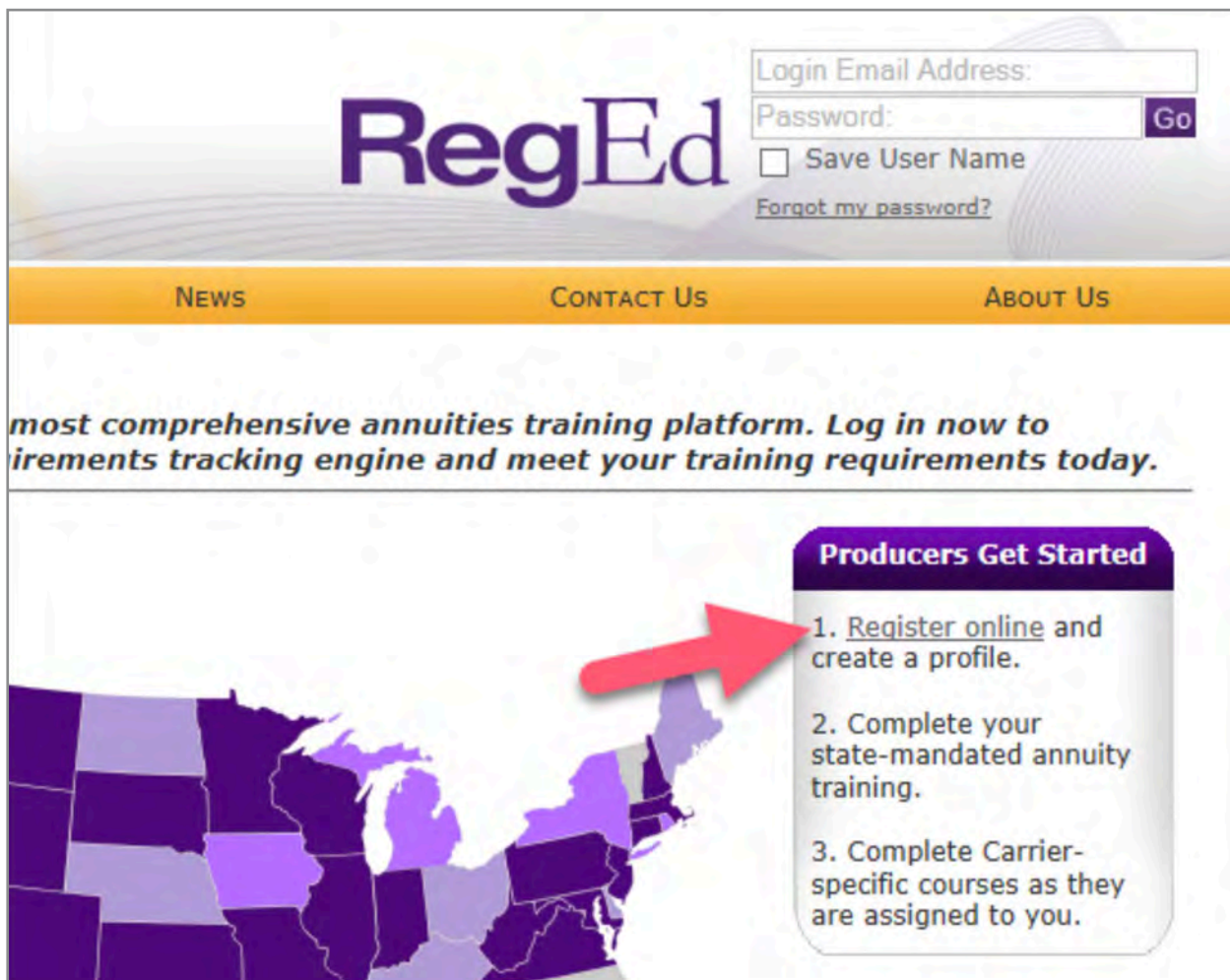
Go to <https://secure.reged.com/TrainingPlatform/>. Log in with your email address and password at the top right-hand corner of page. That's it! Now go to the **Get started** instructions below.



The image shows a close-up of the RegEd login interface. On the left is the 'RegEd' logo in a purple serif font. To the right are two input fields: 'Login Email Address:' and 'Password:'. A purple 'Go' button is positioned to the right of the password field. Below the password field is a checkbox labeled 'Save User Name' and a link that says 'Forgot my password?'.

## If you're new to RegEd

Click on the **Register online** link on the right-hand side of the home page, as shown below.



The image shows a screenshot of the RegEd home page. At the top, there is a navigation bar with 'NEWS', 'CONTACT US', and 'ABOUT US' links. Below the navigation bar is a banner with the text: *most comprehensive annuities training platform. Log in now to view requirements tracking engine and meet your training requirements today.* Below the banner is a map of the United States. A red arrow points from the map to a purple box titled 'Producers Get Started'. The box contains a three-step list: 1. Register online and create a profile. 2. Complete your state-mandated annuity training. 3. Complete Carrier-specific courses as they are assigned to you.

Complete the **Self Registration** page. Once you've completed all the required fields, click on **“Register”** to create your profile.

After you've registered, select the state in which you are selling or plan to sell annuity products. Input the required information and save.

The screenshot shows the 'Current Insurance Licenses' section of the RegEd website. At the top left is the IRI logo and the 'RegEd' brand name. Below this is a dark blue header bar. The main content area has a title 'Current Insurance Licenses' followed by a sub-header 'Manage Insurance Licenses'. A prompt reads 'Please enter your insurance license information:'. Below this is a table with columns: 'Delete', 'State', 'Resident', and 'Annuities Sold'. The 'Annuities Sold' column has a 'Select All' checkbox. The 'State' column contains a dropdown menu with 'Select a State' and a downward arrow. The 'Resident' column has an unchecked checkbox. Below the table is an 'Add a New State' button. A message states 'Once your states have been indicated, select Save to continue.' and a 'Save' button is located at the bottom left of the form area.

Delete	State	Resident	Annuities Sold
X	Select a State	<input type="checkbox"/>	<input type="checkbox"/> Select All

Once your states have been indicated, select **Save** to continue.

You're all set! Go to the **“Get started”** instructions below

### Get started

After logging in you will be at the **Producer Status** screen

Scroll down to the **“Add Product Code”** field and enter the correct code for the product training you wish to take. Click on **“Submit”**. If you need help with product codes, please reach out to your back office or your Principal internal wholesaler.

**Producer Status**

**Annuities State Suitability Compliance Summary**

! Any producer selling Indexed products are also subject to complete the required training for Fixed & Variable products.

State	Resident?	Requirement Met?	Product Type	Course Status
Iowa	Yes	No see details below	Fixed & Variable	Order Course
Iowa	Yes	No see details below	Indexed	Order Course
New York	No	No see details below	All	Order Course

Iowa - If you were licensed on or after 1/1/2021, completing 490 or 490\_IN will satisfy the state requirements to sell annuities despite the req

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New York- RegEd offers two courses, 484\_NY (5 hours) and 485\_NY (1 hour), to fulfill the Life and Annuity training requirement in Regulation 1 consult with your carrier to determine which course you should take. RegEd also offers course 484\_NY\_L covers content for producers who sell

Manage My State Suitability Requirements

**Best Interest State Training**

State	Resident?	Requirement Met?	Product Type	Course Status
New York	No	No	All	Order Course

The following states do not have Best Interest Requirements in place: Iowa

Manage My Best Interest Requirements

**Add Product Code**

Enter a Product Code to receive access to company-specific training. Product Codes are sometimes referred to as JIT codes

Product Code:  Submit View My Codes

Carrier-specific product training will appear. Click on **“Go To Requirement”** to launch training course.

**Add Product Code**

Enter a Product Code to receive access to company-specific training. Product Codes are sometimes referred to as JIT codes

Product Code:  Submit View My Codes

**Carrier-Specific Product Training**

Requirement	Completion Date	Requirement Status
<b>Carrier 2</b> 2011 Annual Compliance Meeting (11REGSP_ACM)		Go To Requirement
<b>Carrier 1</b> An Overview of Equity Indexed Annuities - Spotlight Series (711)		Go To Requirement
<b>Demo Carrier 1</b> Demo Carrier 1 - Course B (DemoCourseB)		Go To Requirement

You'll be required to take a short exam once the training is complete. To access the exam, click the **"Next"** button on the final page of the course. Select the **"Exam"** button at the top of the page to launch your exam.

Contract rider descriptions are not indented to cover all restrictions, conditions or limitations. Refer to rider for full details.

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This concludes the online training.

In order to receive credit for completing this course you must pass a final exam.

Click the Exam button below to be directed to the exam.

**Exam**

**Back**

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You'll need a score of 100% on the exam in order to receive credit. When the exam has been successfully completed, your certificate of completion will be displayed.

**RegEd**

**Course Completion Record**  
**Thomas Elliott has completed:**  
**Course number: 15PIA\_01**  
**Course title: Principal Income Annuity**  
**Feb 11, 2021 9:53:10 AM**

This record of successful course completion is for your personal records only. If you ordered CE for this course and would like to check the status of CE credits please return to the My Courses screen. If you need additional information, please contact RegEd.com Customer Service at [800.334.8322](tel:800.334.8322) Monday through Friday from 8:00 a.m. to 8:00 p.m. EST.

Close Window

You may want to print a copy to keep in your files.

If the exam is not completed successfully, a notification will be displayed and you will be given the opportunity to retake the exam until you complete successfully.

Principal Lifetime Income Solutions II(17PLIS2\_01)

Current Section of Exam - 1  
Number of Exam Sections - 1  
Exam Question - 6 of 6

Exam Section Score - 0  
Required Section Score - 5  
Total Score for Completed Sections - 0

**Failed Section**

You did not achieve a passing score for this section. You will be presented with the Section questions again in random order.  
Please Continue

Continue

If you have questions about training requirements and verification, please contact Sales Compensations Administration, 800-388-4793, option 2.

If you're having technical issues accessing the courses, please contact RegEd Customer Service at 800-334-8322, option 2. Let them know you are trying to complete training with Principal.



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