

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.

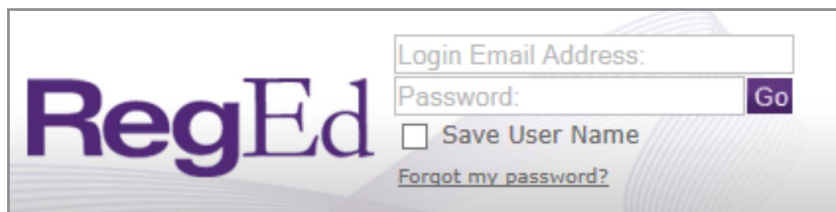
[Go to the RegEd training website](https://secure.reged.com/TrainingPlatform/)

(<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.

A screenshot of the RegEd login interface. It features the RegEd logo on the left. To the right, there are two input fields: "Login Email Address:" and "Password:". A "Go" button is positioned to the right of the password field. Below the password field, there is a checkbox labeled "Save User Name" and a link that says "Forgot my password?".

RegEd

Login Email Address:

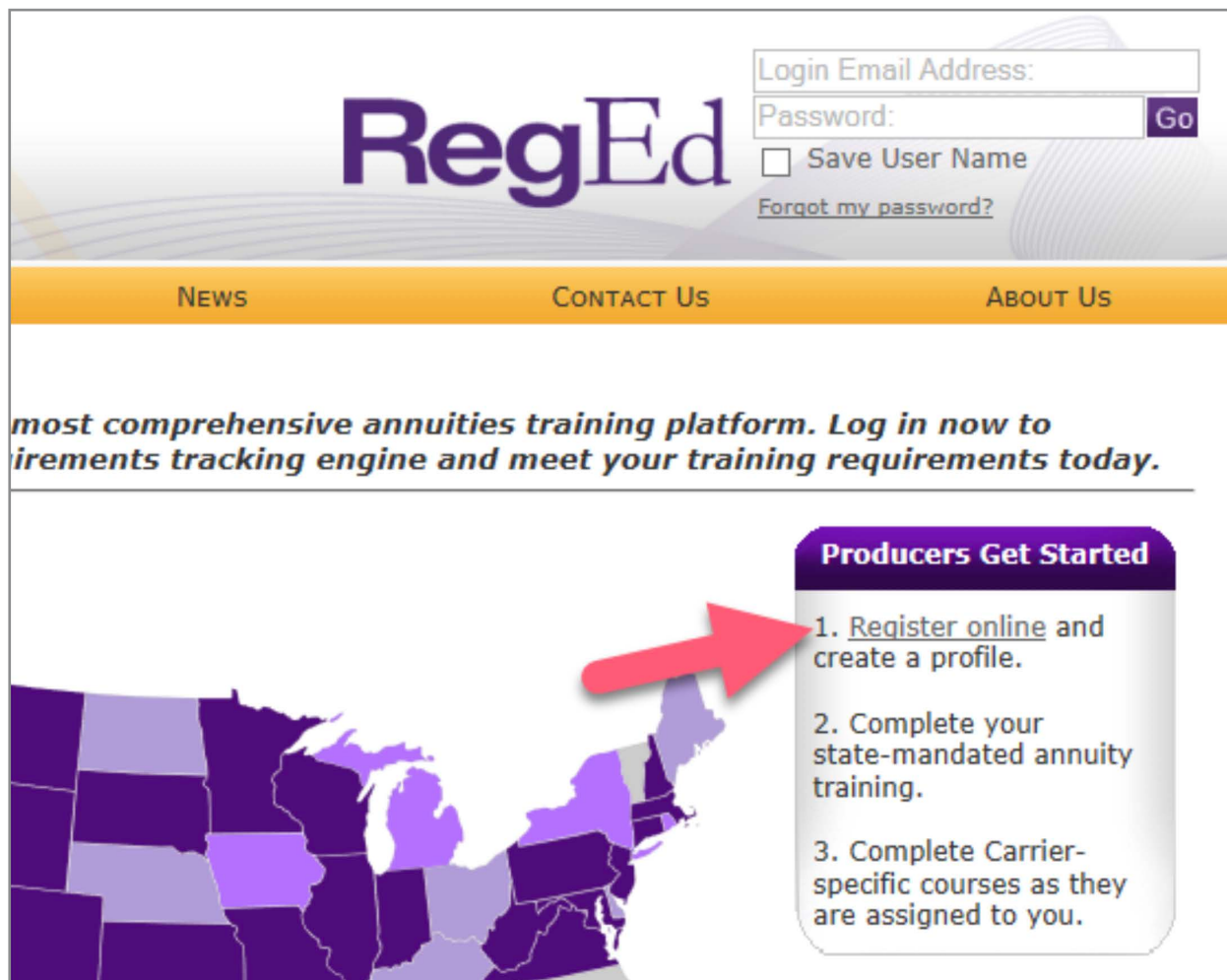
Password:

☐ Save User Name

[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.

A screenshot of the RegEd home page. At the top, there is a login section with the RegEd logo, input fields for "Login Email Address:" and "Password:", a "Go" button, a "Save User Name" checkbox, and a "Forgot my password?" link. Below this is a navigation bar with "NEWS", "CONTACT US", and "ABOUT US" links. A banner below the navigation bar reads: "most comprehensive annuities training platform. Log in now to requirements tracking engine and meet your training requirements today." At the bottom, there is a map of the United States with a red arrow pointing to a box titled "Producers Get Started". This 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.

RegEd

Login Email Address:

Password:

☐ Save User Name

[Forgot my password?](#)

NEWS CONTACT US ABOUT US

most comprehensive annuities training platform. Log in now to requirements tracking engine and meet your training requirements today.

Producers Get Started

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 'RegEd' interface with a header containing the IRI logo and the 'RegEd' text. Below the header, the section 'Current Insurance Licenses' is displayed. Inside this section, there is a box titled 'Manage Insurance Licenses' with the instruction 'Please enter your insurance license information:'. Below this instruction is a table with the following structure:

Delete	State	Resident	Annuities Sold
☐	Select a State	☐	☐
☐	Select a State	☐	☐

Below the table, there is a button labeled 'Add a New State'. To the right of the table, there is a checkbox labeled 'Select All'. Below the table, there is a text prompt: 'Once your states have been indicated, select **Save** to continue.' At the bottom of the form, there is a 'Save' button.

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.

Status
Product Code
Ability Training
Insurance CE
Courses
Print
Home
Carrier 1

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 requirement to complete the required training for Fixed & Variable products.

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 requirement to complete the required training for Indexed products.

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:

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

Add Product Code

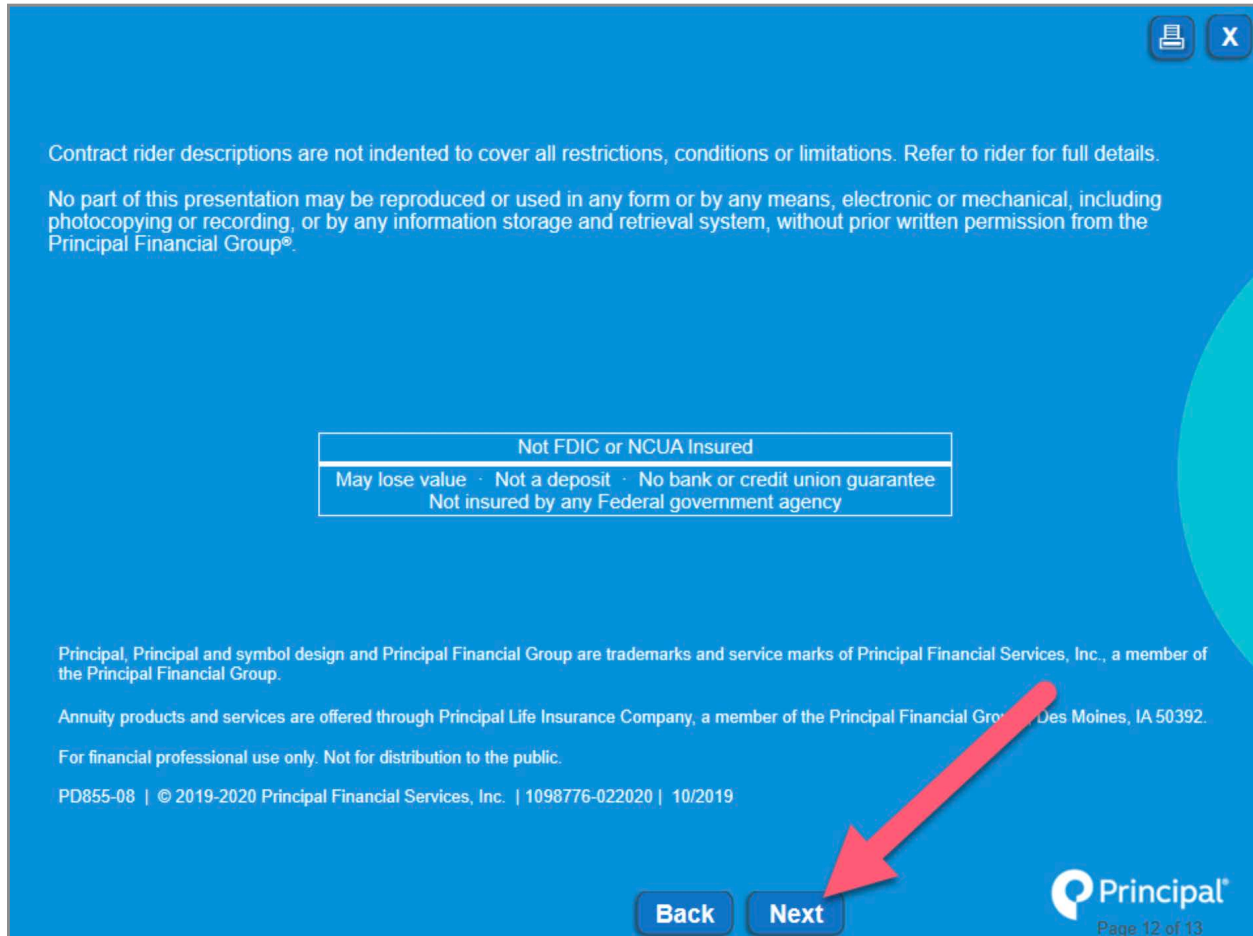
Enter a Product Code to receive access to company-specific training. Product Codes are sometimes referred to as JIT codes

Product Code:

Carrier-Specific Product Training

Requirement	Completion Date	Requirement Status
Carrier 2		
2011 Annual Compliance Meeting (11REGSP_ACM)		Go To Requirement
Carrier 1		
An Overview of Equity Indexed Annuities - Spotlight Series (711)		Go To Requirement
Demo Carrier 1		
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.



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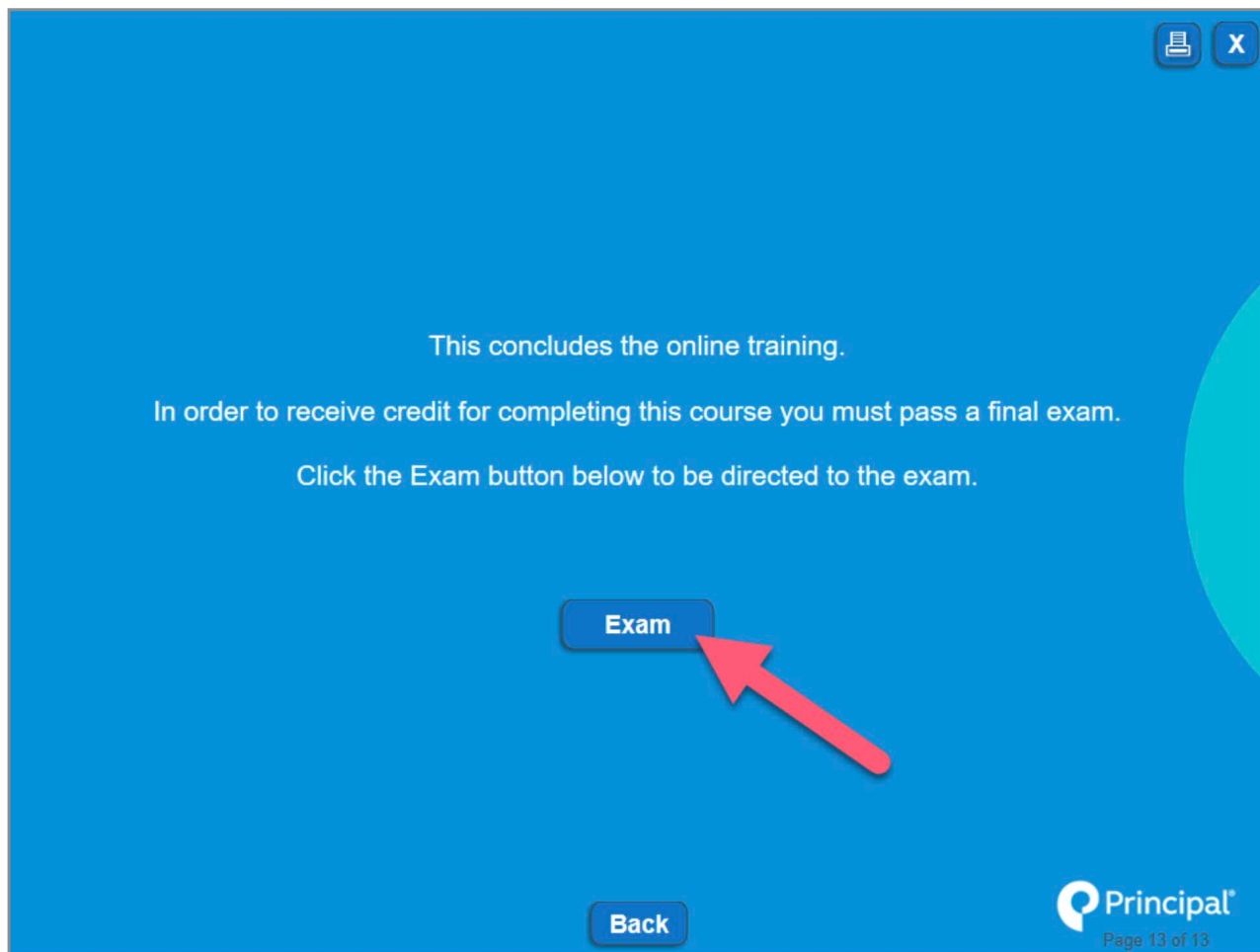
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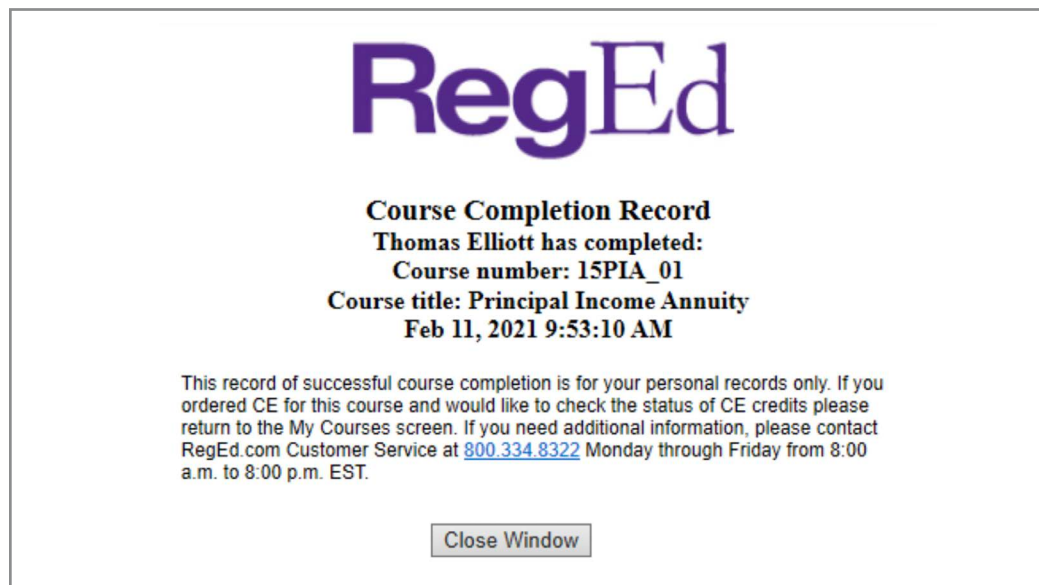
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 **Principal**
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You'll need a score of 100% on the exam in order to receive credit. When the exam has been successfully completed, your certificate of completion will be displayed.



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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