



NAIC Product Training – Accessing the Website



For Broker/Dealer Use Only. Not for Public Distribution.

NAIC Product Training



<https://naic.pinpointglobal.com/BrighthouseFinancial/apps/default.aspx>

First time users

[Click here to register](#)

Returning users

Username:

Password:

[Log In](#)

NPN Lookup

Forgot Password?

[Click here or
call the Sales Desk
support number below.](#)

Contact Us

[How to Contact Support](#)
Sales Desk: 1-800-848-3854

MSI Financial Dedicated Sales
Desk: 1-888-577-5780, option 1

Annuity Product Training

Welcome to the Brighthouse Financial Annuity Product Training Site

This site provides the annuity product training modules required for you to solicit sales in Brighthouse Financial variable and/or fixed annuities in states that have adopted suitability regulations based on the National Association of Insurance Commissioner's Suitability in Annuity Transactions Model Regulation. In order to access the product training modules, please enter the site either by registering as a first time user by clicking on the button to the left or, if you are a returning user, by entering your previously created username and password.

First time users should click on "Click here to register." This allows you to access the profile page.



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Registration Page

Personal Information

Fill in your personal information in the spaces provided. All boxes with an “*” are required information.

First Name:*

Middle Initial:


Last Name:*

Suffix:

E-mail:*

Confirm E-mail:*

Phone: * () - x

State of Residence: * 

You can click this link to look up your NIPR number. This will lead you to a secure link on the NIPR website.

If your National Producer Number (NPN) is not prepopulated in both fields below, you must click on the "Lookup NPN using NIPR" in order to configure these fields properly.

To access this site going forward, the username will be your National Producer Number (NPN).

National Producer Number:*

Confirm National Producer Number:*

CRD Number:

[Lookup NPN using NIPR](#)

[Click here to lookup your CRD number through FINRA.](#)

NIPR Website Look-Up

The National Producer Number (NPN) is a unique number that identifies each producer in the Producer Database (PDB). It was created to provide a solution to privacy issues surrounding the use of the Social Security Number.

The NPN is up to a 10-digit number, without leading zeros which is assigned to individual producers and some agencies.

Producers and Agencies have their NPN's assigned automatically at the time of their addition to the PDB.

To find your NPN, use one of the search options below:

Search by SSN & Last Name

Search by License

SSN:

Last Name:

Reset

Submit Query

Cancel

Use this NPN

Enter your Social Security Number (SSN) and last name. Click on "Submit Query". This will direct you to the secure National Insurance Producer Registry (NIPR) website.

Please note: Your SSN will not be stored on the Brighthouse Financial NAIC Product Training website.

NIPR Website Look-up

The National Producer Number (NPN) is a unique number that identifies each producer in the Producer Database (PDB). It was created to provide a solution to privacy issues surrounding the use of the Social Security Number.

The NPN is up to a 10-digit number, without leading zeros which is assigned to individual producers and some agencies.

Producers and Agencies have their NPN's assigned automatically at the time of their addition to the PDB.

To find your NPN, use one of the search options below:

Search by SSN & Last Name

Search by License

SSN:

...

Last Name:

Smith

Reset

Submit Query

Found: **1234567 for Smith, John Joseph** with Birth Date **10/1/1965** residing in **WA**.

Cancel

Use this NPN

Once the NPN is located, the information will appear under the search box.
If this information is correct, click on "Use this NPN."

NIPR Website Look-up

If your National Producer Number (NPN) is not prepopulated in both fields below, you must click on the "Lookup NPN using NIPR" using NIPR' in order to configure these fields properly.

To access this site going forward, the username will be your National Producer Number (NPN).

National Producer Number:*

1234567

Lookup NPN using NIPR

Confirm National Producer Number:*

1234567

CRD Number:

[Click here to lookup your CRD number through FINRA.](#)

The NPN is auto-filled on the registration page.

Registration Page

Select all state(s) in which you are appointed to sell annuities.

* indicates which states have adopted the NAIC SAT Model Regulation.

- | | | | | |
|---|---|---|---|--|
| <input type="checkbox"/> Alabama | <input type="checkbox"/> Alaska * | <input type="checkbox"/> Arizona | <input type="checkbox"/> Arkansas | <input type="checkbox"/> California * |
| <input type="checkbox"/> Colorado * | <input type="checkbox"/> Connecticut * | <input type="checkbox"/> Delaware | <input type="checkbox"/> District of Columbia * | <input type="checkbox"/> Florida * |
| <input type="checkbox"/> Georgia | <input type="checkbox"/> Hawaii * | <input type="checkbox"/> Idaho * | <input type="checkbox"/> Illinois * | <input type="checkbox"/> Indiana * |
| <input type="checkbox"/> Iowa * | <input type="checkbox"/> Kansas * | <input type="checkbox"/> Kentucky * | <input type="checkbox"/> Louisiana * | <input type="checkbox"/> Maine * |
| <input type="checkbox"/> Maryland * | <input type="checkbox"/> Massachusetts | <input type="checkbox"/> Michigan * | <input type="checkbox"/> Minnesota * | <input type="checkbox"/> Mississippi * |
| <input type="checkbox"/> Missouri | <input type="checkbox"/> Montana | <input type="checkbox"/> Nebraska * | <input type="checkbox"/> Nevada | <input type="checkbox"/> New Hampshire * |
| <input type="checkbox"/> New Jersey * | <input type="checkbox"/> New Mexico | <input type="checkbox"/> New York * | <input type="checkbox"/> North Carolina | <input type="checkbox"/> North Dakota * |
| <input type="checkbox"/> Ohio * | <input type="checkbox"/> Oklahoma * | <input type="checkbox"/> Oregon * | <input type="checkbox"/> Pennsylvania | <input type="checkbox"/> Puerto Rico |
| <input type="checkbox"/> Rhode Island * | <input type="checkbox"/> South Carolina * | <input type="checkbox"/> South Dakota * | <input type="checkbox"/> Tennessee * | <input type="checkbox"/> Texas * |
| <input type="checkbox"/> Utah * | <input type="checkbox"/> Vermont | <input type="checkbox"/> Virginia | <input type="checkbox"/> Washington * | <input type="checkbox"/> West Virginia * |
| <input type="checkbox"/> Wisconsin * | <input type="checkbox"/> Wyoming * | | | |

Select all state(s) in which you are appointed to sell Brighthouse Financial Annuities.

Registration Page

Broker/Dealer Selection

Please type the first few letters of the name of the Broker/Dealer you are registered with, then select from the list presented and click the 'Select Broker/Dealer' button. To update your profile with a new Broker/Dealer, select the new Broker/Dealer in the same manner and click on the 'Select Broker/Dealer' button.

Select Broker/Dealer

Abshier Webb Donnelly & Baker, Inc.

Access Financial Group, Inc.

Adirondack Trading Group, LLC.

Advanced Advisor Group, LLC.

Advisory Group Equity Services LTD

Aegis Capital Corp

Affinity Investment Services, LLC

Alamo Capital

Alexander Capital, LP

Alexandra & James, Co.

Allegheny Investments, Ltd.

Allegiance Capital, L.L.C. dba Richard Brothers Financial Advisors

Allegiant Securities, LLC

Allegis Investment Services LLC

Allen & Company of Florida, Inc.

Allen C. Ewing & Co.

Allen, Mooney & Barnes Brokerage Services, LLC

Alliance Advisory & Securities, Inc.

Allied Beacon Partners, Inc.

Alternative Wealth Strategies, Inc

Amegy Investments, Inc.

AMERICAN BEACON PARTNERS, INC.

American Capital Partners, LLC

American Classic Securities, Inc.

American Diversified Financial Group LLC

American Equity Investment Corporation

To select your Broker Dealer begin typing the name and the list will appear. Click on "Select Broker/Dealer."

Registration Page

Create Your Password

Must be 8 characters and include 1 number (e.g. abcdefg4). Please make note of this password. You will need it the next time you access this site.

Password: *

Confirm Password: *

By clicking Register, I certify that I am registering on this site as myself. I understand that registering on this site under the name of another individual, completing training on behalf of another individual, or requesting another individual to register on this site or complete training on my behalf, is strictly prohibited.

Register

You are able to create your own password, then click “Register.”

Registration Page



Contact Us

How to Contact Support
Phone: 1-866-888-4621

Registration

If you need assistance to complete your registration, please contact the State-Required Annuity Training Helpline at 866-888-4621.

To register:

- Complete all required fields.
- Click the Submit Registration button at the bottom of the screen to proceed to the Training page
- Please supply only the email at your broker dealer, not a personal e-mail address


Please note your username below. You will need this information for future logins to this site.
Your username is your National Producer Number (NPN).

Your username is: **npn-17380730**

Continue

Be sure to write down your username and password for future access to the site.
Click "Continue."

My Training

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[Home](#)
[My Training](#)
[My Transcript](#)

On the My Training page you will see the product training courses available for your Broker/Dealer. First, you must complete the prerequisite course by clicking on “Suitability in Annuity Transactions Training.”

LPL Financial Corporation

☐ Prerequisite (Click to expand or collapse this training section. To launch a course, click on the course name.)

	Description	Program
<input type="checkbox"/> Suitability in Annuity Transactions Training (GSAT.1015) July 2013	Suitability in Annuity Transactions Training (GSAT.1015)	00:08

Note: The training requirements outlined in this module may differ on a state-by-state basis. Refer to the state-specific compliance communication for states where you are licensed to determine if there are unique training requirements for sales in those states.

☐ Variable Annuity (Click to expand or collapse this training section. To launch a course, click on the course name.)

☐ Fixed Annuity (Click to expand or collapse this training section. To launch a course, click on the course name.)

☐ Investment Oriented Annuity Training (Click to expand or collapse this training section. To launch a course, click on the course name.)

☐ Fixed Income Annuity (Click to expand or collapse this training section. To launch a course, click on the course name.)

☐ Index Linked (Click to expand or collapse this training section. To launch a course, click on the course name.)

Exit Module

The screenshot displays the Brighthouse Financial training interface. On the left is a sidebar with a 'Menu' and 'Notes' tab. The 'Menu' tab is active, showing a list of nine items: 1. Welcome, 2. Suitability Regulation Introdu..., 3. Suitability Regulation Training, 4. Suitability Requirements, 5. Suitability Requirements, 6. Suitability Requirements, 7. Prohibited Actions, 8. Penalties for Violations, and 9. Congratulations. Item 9 is highlighted. The main content area is titled 'NAIC Suitability in Annuity Transactions Training [GSAT.1114] (08:02 / 08:02)'. In the top right corner of the main area, there are two links: 'Resources' and 'Exit'. A red arrow points from a callout box to the 'Exit' link. The callout box contains the text: 'Once the course is completed, click “Exit” to go back to the Training Page to complete the remaining modules.' At the bottom of the main area, there is a video player with a progress bar and controls. Below the video player, the text 'L0816473923[exp0117]' and 'For Broker/Dealer Use Only. Not for Public Distribution.' are visible.

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Menu Notes

1. Welcome
2. Suitability Regulation Introdu...
3. Suitability Regulation Training
4. Suitability Requirements
5. Suitability Requirements
6. Suitability Requirements
7. Prohibited Actions
8. Penalties for Violations
9. Congratulations

NAIC Suitability in Annuity Transactions Training [GSAT.1114] (08:02 / 08:02)

Resources Exit

Once the course is completed, click “Exit” to go back to the Training Page to complete the remaining modules.

L0816473923[exp0117]

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My Training

Refresh

MSI Financial Service, INC.

☒ Prerequisite [\(Click to expand or collapse this training section. To launch a course, click on the course name.\)](#)

☒ Variable Annuity [\(Click to expand or collapse this training section. To launch a course, click on the course name.\)](#)

☒ Fixed Annuity [\(Click to expand or collapse this training section. To launch a course, click on the course name.\)](#)

☐ Fixed Income Annuity [\(Click to expand or collapse this training section. To launch a course, click on the course name.\)](#)

☐ SPIA and Guaranteed Income Builder (GIB)Training (E23.0716)

Description	Program Length	Status	Date Completed
SPIA and Guaranteed Income Builder (GIB)Training (E23.0716)	00:25	Incomplete	

☒ Index Linked [\(Click to expand or collapse this training section. To launch a course, click on the course name.\)](#)

☒ Brighthouse Shield Level Selector (BSLS.0317)

Description	Program Length	Status	Date Completed
MetLife Shield Level Selector (MSLS.0116)	00:28	Complete (OL)	1/19/2017

☐ Investment Oriented Annuity Training [\(Click to expand or collapse this training section. To launch a course, click on the course name.\)](#)

☐ Investment Portfolio Architect Training (IPA.0516)

Description	Program Length	Status	Date Completed
Investment Portfolio Architect Training (IPA.0516)		Incomplete	

My Transcript

You can always click on “My Transcript” to see what courses have been completed or download a PDF of your transcript.

Home
My Training
My Transcript
Reporting
Administration

Contact Us

How to Contact Support
Sales Desk: 1-800-848-3854

MSI Financial Dedicated Sales
Desk: 1-888-577-5780, option 1

Version: 2.2.1052.0



My Transcript

The transcript information on this page shows your progress toward achieving “Ready to Sell” status in each product category. You can print a PDF of this page as your needs require. Use the “expand or collapse” feature to view your transcript details. If you have questions about the transcript information displayed, please contact the Training Support Hotline at 1-888-888-4621.

Broker/Dealer: **LPL Financial Corporation - (1/20/2017 - current) v.9**

Generate PDF

Note: When switching between Broker-Dealers, please allow the screen to refresh before clicking Generate PDF.

LPL Financial Corporation - (1/20/2017 - current) v.9

☒ **Prerequisite** [\(Click to expand or collapse this training section. To launch a course, click on the course name.\)](#)



Suitability in Annuity Transactions Training (GSAT.0816)

Description	Program Length	Status	Date Completed
Suitability in Annuity Transactions Training (GSAT.0816)	00:08	Complete (OL)	10/20/2015

☒ **Variable Annuity** [\(Click to expand or collapse this training section. To launch a course, click on the course name.\)](#)



Series VA-4 Product & Rider Training (E1.0216)

Description	Program Length	Status	Date Completed
Series VA-4 Product & Rider Training (E1.0216)	00:43	Complete (OL)	1/19/2017

☐ **Investment Oriented Annuity Training** [\(Click to expand or collapse this training section. To launch a course, click on the course name.\)](#)



Investment Portfolio Architect Training (IPA.0516)

Description	Program Length	Status	Date Completed
Investment Portfolio Architect Training (IPA.0516)		Incomplete	

☐ **Fixed Income Annuity** [\(Click to expand or collapse this training section. To launch a course, click on the course name.\)](#)



SPIA and Guaranteed Income Builder (GIB) Training (E23.0716)

Description	Program Length	Status	Date Completed
SPIA and Guaranteed Income Builder (GIB) Training (E23.0716)	00:25	Incomplete	

☒ **Index Linked** [\(Click to expand or collapse this training section. To launch a course, click on the course name.\)](#)



Brighthouse Shield Level Selector (BSLS.0317)

Description	Program Length	Status	Date Completed
MetLife Shield Level Selector (MSLS.0116)	00:28	Complete (OL)	1/19/2017

☒ **Fixed Annuity** [\(Click to expand or collapse this training section. To launch a course, click on the course name.\)](#)



FA Training (E11.0715)

Description	Program Length	Status	Date Completed
FA Training (E11.0715)	00:07	Complete (OL)	1/19/2017

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Transcript Example



NAIC Annuity Training and Certification

Susan

Completion Type Date Completed

LPL Financial Corporation

(1/20/2017 - current) revision (9)

Prerequisite

Suitability in Annuity Transactions Training (GSAT.0816)	OL	10/20/2015
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Variable Annuity

Series VA-4 Product & Rider Training (E1.0216)	OL	1/19/2017
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Investment Oriented Annuity Training

Investment Portfolio Architect Training (IPA.0516)		Incomplete
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Fixed Income Annuity

SPIA and Guaranteed Income Builder (GIB) Training (E23.0716)		Incomplete
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For more information, please contact our
sales desk at
1-800-848-3854
or visit us at www.BrighthouseFinancialPro.com