

THE MONTHLY QUEST

Annuity Suitability Training Program

Quest CE will soon be unveiling a new program to meet the NAIC Annuity Suitability Training Requirement. Currently, 30 states have adopted the regulation which requires life insurance organizations that delegate the supervision of suitability to third-party distributors to receive annual certifications from those distributors.

New Insurance CE Site for Advisors

Quest CE is pleased to announce the launch of our new website geared toward financial professionals looking to purchase high-quality continuing education (CE) courses at affordable prices.

The site, www.InsuranceContinuingEducationTraining.com, offers individual courses for as little as \$4.95. Quest has courses approved for insurance CE credit in all 50 states, Washington, DC, and for professional designations like CFP, CLU/ChFC, and CIMA. 12-month Unlimited CE packages are also available for every state and designation starting at \$12.95. These are a great value for professionals looking to fulfill their CE requirement online.

"We wanted to make the process of signing up for courses as simple as possible for financial professionals," says Alan Krenke, President and CEO of Quest CE. "Since we offer such a broad array of services to nearly every sector of the financial world, we were concerned that our retail users were overwhelmed when they got to our site. With this new site, they will no longer have to search for what they need."

As well as taking courses on the new site, professionals will also be able to review their state CE requirements, read about recent regulatory updates, and view course overviews and demos.

2008 NAVA Marketing Conference Update

Quest CE will be exhibiting at the 2008 NAVA (National Association of Variable Annuities) Marketing Conference in La Quinta, California.

The conference, which runs from February 24th to the 27th, will feature elective educational sessions, general sessions, and a keynote address by Malcolm Gladwell, author of the "The Tipping Point" and "Blink: The Power of Thinking Without Thinking."

This will mark the second consecutive year, and third time in the last four, that Quest CE has exhibited at the NAVA Marketing Conference.

Quest Announces the Redesign of Websites

Quest has created or redesigned all of its industry-specific websites to make them both more informative and user-friendly. Currently, Quest CE administers nine websites. They are:

- www.QuestCE.com
- www.InsuranceContinuingEducationTraining.com
- www.QuestCFPContinuingEducation.com
- www.FirmElementTraining.com
- www.Anti-MoneyLaunderingTraining.com
- www.CEVoucherCard.com
- www.DeferredVariableAnnuityTraining.com
- www.OnlineBankTraining.com
- www.Credit-UnionTraining.com

Each of the sites is updated regularly and provides firms with easy access to information about the services Quest offers.

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questtrak® Version 3.0 has been Released.

Quest CE, the financial service industry's premier provider of continuing education (CE) and compliance training solutions, has released version 3.0 of their questtrak administration tool.

questtrak is used by insurance and mutual fund wholesalers and sales support professionals who host continuing education events in branch offices for financial advisors. questtrak offers an array of scheduling, tracking, and reporting capabilities allowing firms to more effectively manage their value-added insurance and designation CE program.

New functionality incorporated into questtrak version 3.0 includes an improved calendaring system that allows CE instructors and administrators to view, edit, and cancel events on a month-by-month basis, increased intelligence preventing an invalid course offering from being set-up, and a series of reports that can be uploaded directly to a firm's CRM system for follow-up by an internal sales desk. Information that can be reported includes; name, company, address, email, phone number, and seminar attended.

"The added tracking, reporting, and intelligence will help CE administrators and sales staff better manage their program," says Patrick Torhorst, Director of IT for Quest CE. "As a company we strive to not only meet but exceed our clients' expectations. The functionality we've added to the system gives them access to a more powerful tool that will help them develop stronger relationships with agents and advisors."

Using both client and associate feedback, Quest CE makes regular updates to its reporting and tracking functionality. In addition, Quest CE also creates customized solutions to meet its clients' evolving needs.

QUEST CE

FINRA Rule 2821 Set to Take Effect in May

Despite the recent SEC ruling, which delayed paragraph (c) of FINRA Rule 2821 from going into effect until August 4, 2008, registered representatives and supervisors must begin to comply with training requirements on May 5, 2008.

Rule 2821, also called the Variable Annuity Rule, requires organizations to train their registered representatives on deferred variable annuities. Both firms and agents must understand the requirements of the new rule and establish a schedule for compliance training. They must also have a record-keeping system in place.

Developed by industry experts, Quest CE's Deferred Variable Annuity Training Program allows supervisors and registered representatives to complete the training module online at their convenience. Once a student successfully completes a course, they may print a certificate of completion for their records. Additionally, student progress and completions can be monitored by compliance administrators online, and all records are maintained through Quest CE's online record-keeping solution.

Quest CE's deferred variable annuity training program was designed to help financial professionals understand the suitability issues that affect the sale or exchange of deferred variable annuities.

With Quest CE's two training modules, one for supervisors and one for producers, companies can ensure compliance with FINRA Rule 2821 for as little as \$2 per user.

**Custom Firm Element
Programs Starting at \$50** /per rep