

NAIC Portal: Frequently Asked Questions

Do I need to register to access product training?

Self-registration is required to access training if you are a new user on the NAIC platform. This is a one-time process. After creating your user profile, you can simply log in to access training on future visits.

Please follow these steps to register:

- Visit the registration page <https://learn.questce.com/naicsuitability/>
- On the page, locate and click on the "**Register Now**" button.
- Complete all the required fields in the registration forms.

What is the self-registration process?

As a new user, you will enter basic profile details for your account to be created and will then be guided through a three-step process:

Step 1: Choose your State-Specific Annuity Training

In this step, you will have the opportunity to select the state training necessary to sell annuities in your particular state.

- If you need to fulfill your Annuity Suitability/Best Interest training requirement and wish to apply those credits towards your state license (Insurance CE), select the top option labeled "**State Training + CE Credit**". *This is the most popular option.*
- If you only need to satisfy the state annuity training requirement without applying the credits to your license renewal, choose the "**State Training Only**" option.
- If you already completed your state training requirement, click on "**Skip Step 1**" to proceed to Step 2.



Step 2: Choose your Broker Dealer/BGA/Independent Firm and Carrier Appointments

During this step, you will be prompted to select your Broker Dealer (or Firm) and Carrier affiliations. This information will assist in determining the appropriate product training courses available to you.

Step 3: Select your Product-Specific Training

At this stage, you can choose the desired product training from a list of courses provided by the carrier. The courses listed are specific to the firm and carrier choices you selected in Step 2.

What if I already have an NAIC account but forgot my password?

If you already have an existing NAIC account, please use the same account credentials to log in. In case you don't remember your password, simply enter your email address as the username. A pop-up window will appear, providing you with a **"Forgot Password"** option to reset your password.

What if I have an NAIC account but my email has changed/is no longer valid?

You can give us a call at (877)593-3366 and we can update your email address for you.

Where can I find if my state requires the 4hr and/or Best Interest Training?

For the most up-to-date information, visit our Regulations by State breakdown, located here: <https://learn.questce.com/naicsuitability/regulations/>



Do I need to submit any of my courses to the carrier?

For most carriers, Quest CE has established a feed that automatically sends course completion information to the carrier. If you requested Insurance CE credits for the state courses during registration and provided accurate information, Quest CE will handle the filing of those credits on your behalf.

How do I update my carrier/broker information to see available product training courses?

Once you're logged into your account, locate the side menu on the left side of the screen and hover over it. From the menu, you have two options:

- Click on "**Manage Appointments**" if you need to update your carrier associations.
- Click on "**Broker Dealer**" if you need to update your affiliated broker-dealer or firm.

After making the necessary updates, navigate to the "**Add Product Specific**" option in the left-hand menu. The system will refresh the list of available courses based on the new firm and carrier selections you have indicated.

If you still do not see the correct Carrier information, you may need to contact your Carrier directly to inquire where to take training.

What is reciprocity and how does it work?

If you complete a state's annuity or BI training course that is substantially similar to another state's course, you may automatically receive credit in that other state as well. This is known as reciprocity.

After finishing a state annuity or BI course in the Quest CE NAIC portal, additional state course completions may be automatically added to your profile if the course you completed grants reciprocal credit in those other states. This saves you from having to take multiple separate courses for states with equivalent NAIC requirements.

Note that only the NAIC training requirement is reciprocal between states. Any continuing education (CE) credits earned do not transfer - reciprocity applies solely to meeting the NAIC (Annuity and Best Interest) training mandate itself.