

# Accessing NY Regulation 187 training courses

## Where to find the Best Interest training modules

NY Regulation 187 requires producers and insurers to implement a process that ensures they're acting in the consumer's best interest when recommending an annuity or life insurance policy issued in New York. This Regulation was effective August 1, 2019, for Annuities and February 1, 2020, for Life Insurance. Below are directions on how you can access the NY Regulation Best Interest training through five CE vendors.

### RegEd

#### NY Regulation 187 Best Interest Training

- NY Reg 187: Suitability and Best Interest of Clients in Life Insurance and Annuity Transactions (484\_NY, a 4- to 5-hour CE course), or
- Best Interest of Clients in Life Insurance or Annuity Transactions: NY Reg 187 – 1-hour Course (485\_NY)

If you already have an account with RegEd, but need to add your NY license number, navigate to the **Producer Status** tab in the left-hand rail. Click "Manage My State Suitability Requirements" to access the page where you can add a new state. When initially registering, you will need to include your NY license number.

#### Annuities State Suitability Product Training

##### Manage Annuities Product Training Requirements

Please indicate the state(s) where you sell or plan to sell annuity products:

Delete?	State	Resident?	License Number	Additional Information
<input type="checkbox"/>	Georgia	<input type="checkbox"/>		
<input type="checkbox"/>	New Jersey	<input type="checkbox"/>		
<input type="checkbox"/>	Texas	<input checked="" type="checkbox"/>	1803502	<div>Initial Annuity Training Completed?</div> <div>Yes</div>

[License Lookup](#)  
[Alt License Lookup](#)

Life CE Date:

10/13/2017

+

Add a New State

+

Save

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

With your NY license number added to your account, the NY Regulation Best Interest training will automatically be populated under the **Producer Status** tab. Just click “Order Course” to get started.

**Producer Status**

**Annuities State Suitability Compliance Summary**

State	Resident?	Requirement Met?	Course Status
Georgia	No	Yes	<a href="#">View My Courses</a>
New Jersey	No	Yes	<a href="#">View My Courses</a>
New York	No	No see details below	<a href="#">Order Course</a>
Texas	Yes	No	<a href="#">Order Course</a>

New York- RegEd offers two courses, 484\_NY (5 hours) and 485\_NY (1 hour), to fulfill the training requirement in Regulation 187. While both courses have been approved by NY DFS, it is the responsibility of the carrier to provide training. Please consult with your carrier to determine which course you should take.

[Manage My State Suitability Requirements](#)

## LIMRA

### NY Regulation 187 Best Interest Training

- Overview of State Best Interest Requirements

After logging-in/registering to your LIMRA account, the desired course will be available at the bottom of the home page. The NY Regulation 187 Best Interest Training can be found under **Regulation 187 Training**.

Welcome to Lincoln Financial Group's Annuity & Life Insurance Training and Certification brought to you by LIMRA!

**My Training Status**

State Specific Training	Company Specific Product Training	Regulation 187 Training
3 Course(s) Remaining <a href="#">View My State Specific Training</a> 0% Completed	6 Course(s) Remaining <a href="#">View My Product Training</a> 16% Completed	2 Course(s) Remaining <a href="#">View My Reg 187 Training</a> 0% Completed

## Kaplan

### NY Regulation 187 Best Interest Training

- New York Suitability and Best Interests in Annuity Transactions (Annuity only), or
- New York Suitability and Best Interests in Life Insurance and Annuity Transactions (combination course), or
- New York Suitability and Best Interests in Life Insurance Transactions (Life only)

To access the NY Regulation 187 courses on Kaplan's platform you will need to login/register and then click on "Enroll Now" under the **State-Specific Training** tab.

The screenshot displays the Kaplan Financial Education website. The header includes the Kaplan logo and a navigation menu on the left. The main banner features the text "Kaplan... Your Hire-to-Retire Solution" and two buttons: "ACCESS YOUR CE COURSES" and "ACCESS PRODUCT TRAINING". Below the banner, a paragraph states: "Kaplan helps busy professionals obtain in-demand certifications and designations that enable them to advance and succeed in their careers. Through live and online instruction, we help our customers gain an edge in the following areas of study:". The main content area is divided into four sections: "STATE-SPECIFIC TRAINING", "ANNUITIES PRODUCT TRAINING", "LIFE INSURANCE PRODUCT TRAINING", and "INSURANCE CE". A red arrow points to the "ENROLL NOW >>" link in the "STATE-SPECIFIC TRAINING" section.

**KAPLAN**  
FINANCIAL  
EDUCATION

Kaplan...  
Your Hire-to-Retire Solution

ACCESS YOUR CE COURSES > ACCESS PRODUCT TRAINING >

Kaplan helps busy professionals obtain in-demand certifications and designations that enable them to advance and succeed in their careers. Through live and online instruction, we help our customers gain an edge in the following areas of study:

<b>STATE-SPECIFIC TRAINING</b>	Enroll in your state-required training courses. After completing your course, you will be provided with a PDF certificate of completion. <a href="#">ENROLL NOW &gt;&gt;</a>	<b>ANNUITIES PRODUCT TRAINING</b>	Enroll in product-specific training courses. You will be directed to Lincoln Financial Group's LIMRA portal. <a href="#">ENROLL NOW &gt;&gt;</a>
<b>INSURANCE CE</b>	Satisfy state-mandated continuing education requirements including Annuity, AML, Long-Term Care, and many more. <a href="#">SELECT YOUR STATE &gt;&gt;</a>	<b>LIFE INSURANCE PRODUCT TRAINING</b>	Enroll in Lincoln Financial Group's product-specific training courses. <a href="#">ENROLL NOW &gt;&gt;</a>

For the NY Regulation 187 Best Interest training, select “New York” under **Insurance CE**, then click continue. You will then need to click on the **Best Interests** tab to locate the appropriate class and add it to your cart.

Select Product Line

Insurance

Securities

Professional Development

CFP® Certification

Accounting & Finance

Insurance Licensing

Master the material for the state Insurance Licensing exam quickly with our innovative study tools and extensive course options.

Select state for training:

Choose

Select line of authority:

Insurance CE

Learn from courses written by industry experts as you satisfy your continuing education or annuities or long-term care training requirements and keep your license current.

Select state for training:

New York

CONTINUE

Product Selection / Insurance CE / Insurance CE / New York

Insurance CE

NY CE Requirements

LIVE CLASS CALENDAR

Provider Number NYPO-100095

Please Note: A New York state-approved proctor must be present to monitor all continuing education examinations. The proctor may charge a fee for this service. Please see the State Requirements tab for additional information.

Insurance CE

Best Interests

Live Classes

Live Online

Important Reminder:

Your state does not permit a course to be repeated either within the same compliance/license renewal period or within a designated calendar time frame from the date last completed (e.g., a two year period, three year period, etc.). To assure receiving credit for this course, please review your records to confirm that this course qualifies for credit for your current compliance/license renewal period.

Total Access CE

Product	Credit Types		Price	
<a href="#">New York Suitability and Best Interests in Annuity Transactions - Internet (1166)</a>	LA Life/Accident and Health Agents	4.00	\$15.20	ADD TO CART
	LB Life Brokers	4.00		
	C1 Life Consultants	4.00		
	LSB Life Settlement Brokers	4.00		
	Eligible CFP® CE	3.00		
<a href="#">New York Suitability and Best Interests in Annuity Transactions Supplement, Revised - Internet (1696)</a>	LA Life/Accident and Health Agents	3.00	\$15.20	ADD TO CART
	LB Life Brokers	3.00		
	C1 Life Consultants	3.00		
	LSB Life Settlement Brokers	3.00		
<a href="#">New York Suitability and Best Interests in Life Insurance and Annuity Transactions-INTERNET (1233)</a>	LA Life/Accident and Health Agents	8.00	\$15.20	ADD TO CART
	LB Life Brokers	8.00		
	C1 Life Consultants	8.00		
	LSB Life Settlement Brokers	8.00		
	Eligible CFP® CE	4.00		
<a href="#">New York Suitability and Best Interests in Life Insurance Transactions (1147)</a>	LA Life/Accident and Health Agents	4.00	\$15.20	ADD TO CART
	LB Life Brokers	4.00		
	C1 Life Consultants	4.00		
	LSB Life Settlement Brokers	4.00		
	Eligible CFP® CE	2.50		
<a href="#">Non-Resident New York Producer Course: New York Suitability and Best Interests in Annuity Transactions [not for CE credit]</a>	Best Interests	0.00	\$15.20	ADD TO CART
<a href="#">Non-Resident New York Producer Course: New York Suitability and Best Interests in Life Insurance and Annuity Transactions [not for CE credit]</a>	Best Interests	0.00	\$15.20	ADD TO CART
<a href="#">Non-Resident New York Producer Course: New York Suitability and Best Interests in Life Insurance [not for CE credit]</a>	Best Interests	0.00	\$15.20	ADD TO CART

## Quest CE

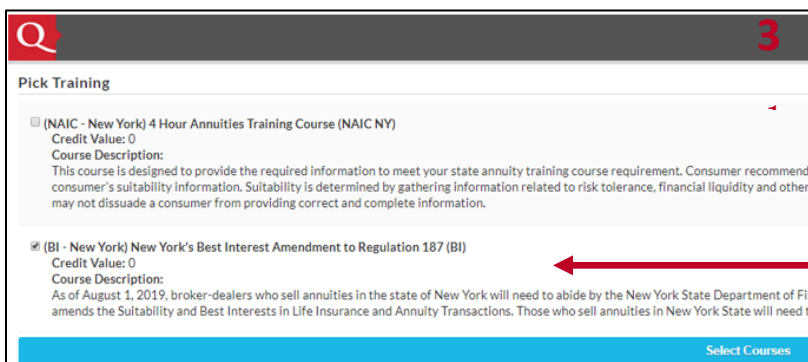
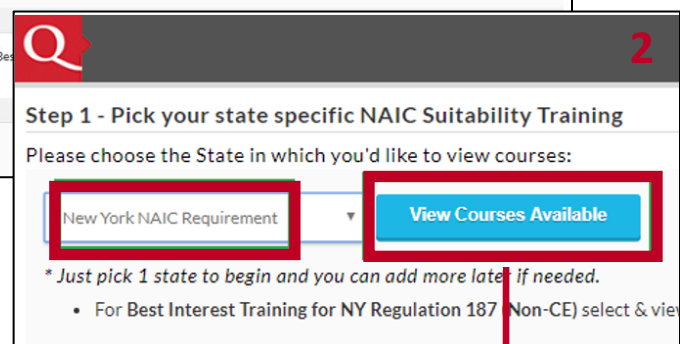
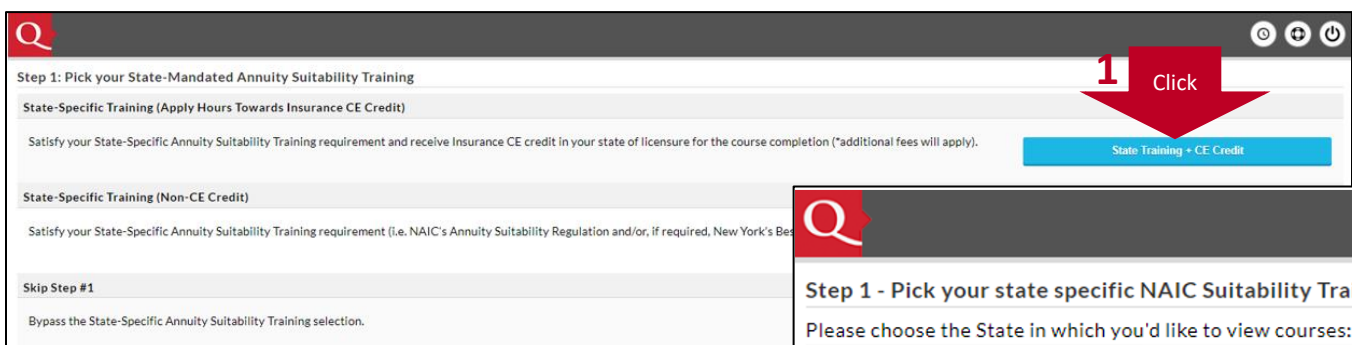
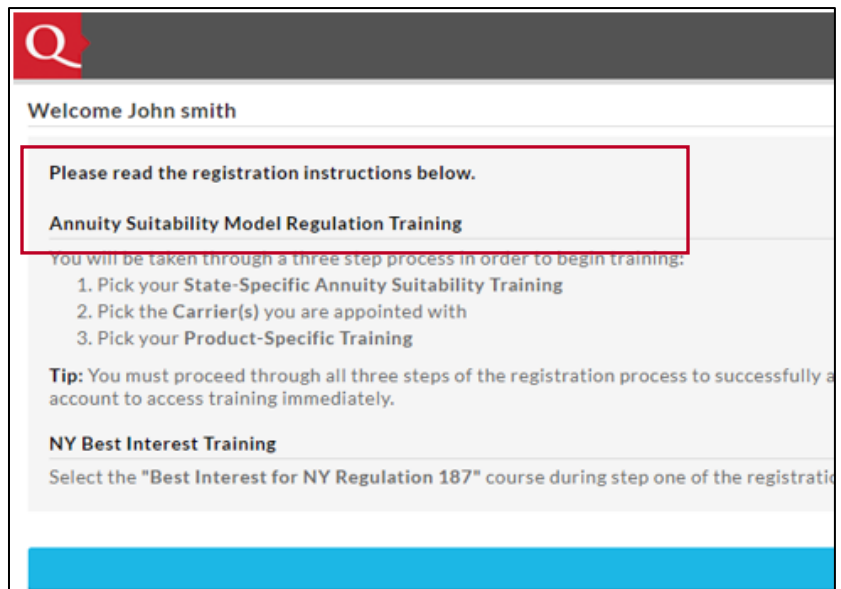
### NY Regulation 187 Best Interest Training

- (NYCS-261350) New York's Best Interest Amendment to Regulation 187 (BI CE), or
- (BI-New York) New York's Best Interest Amendment to Regulation 187 (BI)

If this is your first time registering with Quest CE, you will be able to register for your course while you develop your account.

After entering your personal information, you will be presented with two-steps to access the NY Regulation Best Interest trainings.

Both the CE Credit and Non-CE Credit options under **"State-Mandated Annuity Suitability Training"** provide courses that meet the criteria for the NY Regulation Best Interest training. Select **"New York NAIC Requirement"** to view courses.





For users that already have accounts, after logging in you can add the NY Best Interest training by hovering over the left-hand menu and clicking on **State Specific NAIC Annuity CE** tab. If you choose **State Training + CE Credit** from the options, you will need to select “New York” from the drop-down menu. If you choose **State Training Only** from the options, select “New York NAIC Requirement” from the drop-down.

## Success CE

### NY Regulation 187 Best Interest Training

- NY Regulation 187 and NAIC Suitability

After logging-in/registering to your account, you can gain access to the NY Best Interest training by clicking on **the Purchase Courses** tab in the left-hand rail. To find courses for either your “Resident NY” or “Non-Resident” license, click on the state that you hold your “Resident License” in. If you have a Non-Resident license for New York, you will need to make sure that information is updated in your account.

<b>MEMBER INFO</b> Account Information Change Password Purchase Courses Redeem Your CE Card/CE Voucher Your Rewards points Logout Contact Us Welcome Angel Smith	<div data-bbox="649 1010 1185 1323"> <p><b>Select Your State</b> for Your State Insurance, CFP, Professional Recertification Program (CLU/ChFC), and CIMA/CPWA/IMCA Continuing Education Courses</p> <p><i>All the online self-study courses and hours needed for license renewal</i> <b>just \$35.95*</b></p> <p><small>*not including state fees if applicable</small></p> <p><b>1. CLICK ON YOUR STATE</b>   <b>2. CHOOSE YOUR LICENSE TYPE</b>   <b>3. SELECT YOUR CE COURSES</b></p> <p>United States Canada</p>  <p><small>The Success Family of Continuing Education Companies provides this information as a courtesy to individuals who are subject to insurance continuing education requirements. Due to regulatory requirements we suggest that you contact your state department of insurance to insure that no</small></p> </div>
<b>NEW CONTINUING EDUCATION REQUIRED TO SELL ANNUITIES</b> Click Here for Your State Annuity CE Requirements <b>FEATURES</b> Home Getting Started Browse Course Catalog Purchase Individual	

Next, click on **“Life, Annuity, AML, Long Term Care and Health Insurance CE”** to populate the NY Regulation 187 required courses. Finally, scroll down to select the ones you need.

Click & Scroll

**Select License Category:**

- Life, Annuity, AML, Long Term Care and Health Insurance CE  
Several of these courses are eligible for CFP, CLU/ChFC and CIMA CE. Check for CFP reciprocity under each course number. Extra Certificates can be selected in the Shopping Cart.
- Property & Casualty Insurance CE
- Claims Adjuster CE
- CFP (only) CE (plus covers AAMS, ADPA, APMA, AWMA, CMFC, CRPC, CRPS, MPAS, RP)
- CIMA, CPWA, & IMCA CE
- Professional Recertification Program only CE (and covers CLU/ChFC, RHU, REBC, CASL, CLF, CAP, FSCP, ChHC, ChSNC)
- AML (Anti-Money Laundering)

**Special package pricing offer!** All the online self-study courses and hours you need for renewal for only \$ 35.95\* (you have one year to complete your courses)

1) All Package Pricing Discounts are Automatically Applied When You Checkout  
2) CE Vouchers/Coupons are Also Applied At Checkout

**Click on Boxes on the Right to Select Your Courses**

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**State Specific Insurance Continuing Education Courses**  
Includes Initial and Followup Ethics, LTC, Suitability and Annuity training

**Click box to select**

<b>Suitability &amp; Best Practices in Life Insurance &amp; Annuity Transactions (Reg 187)</b> 4 Hours <small>Meets the NY Reg 187 8/01/2019 Requirement for Best Interests in Annuities and the 02/01/2020 Reg for Life Insurance Products</small>	Pkg or \$9.95 <input type="checkbox"/>
<b>N.Y. Regulation 187 and NAIC Suitability</b> 9 Hours <small>Meets the NY Reg 187 8/01/2019 Requirement for Best Interests in Annuities and the 02/01/2020 Reg for Life Insurance Products Meets NAIC Reg for NY only</small>	Pkg or \$19.95 <input type="checkbox"/>

Residential Licensees will have NY 187 Courses that look like these

<b>Suitability &amp; Best Practices in Life Insurance &amp; Annuity Transactions (Reg 187)</b> 4 Hours <small>Meets the NY Reg 187 8/01/2019 Requirement for Best Interests in Annuities and the 02/01/2020 Reg for Life Insurance Products</small>	Pkg Price <input type="checkbox"/>
<b>N.Y. Regulation 187 and NAIC Suitability</b> 9 Hours <small>Meets the NY Reg 187 8/01/2019 Requirement for Best Interests in Annuities and the 02/01/2020 Reg for Life Insurance Products Meets NAIC Reg for NY only</small>	Pkg Price <input type="checkbox"/>

Non-Residential Licensees will receive this option

<b>Suitability &amp; Best Practices in Life Insurance &amp; Annuity Transactions (Reg 187) - NY Non-Resident Requirement</b> Course Number: NY Reg 187 Non-Resident (NO CE CREDIT) 0 Hours	Pkg or \$9.95 <input type="checkbox"/>
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Insurance products issued by Lincoln Life & Annuity Company of New York, Syracuse, NY, and distributed by Lincoln Financial Distributors, Inc., a broker-dealer. Contractual obligations are backed by the claims-paying ability of the issuing insurance company. Lincoln Financial Group is the marketing name of Lincoln National Corporation and its affiliates. Only Registered Representatives can sell variable products.