How to Access & Complete MassMutual Required Training on Kaplan

In order to comply with NY Regulation 187, you need to complete the **both** Best Interest training as well as MassMutual-specific product training prior to making a recommendation and submitting an application. Here's how you can access the training and what you need to do in order to let MassMutual know that you've completed it.

1) NY Regulation 187: Best Interest & Suitability Training

- This training must be completed for any life insurance or annuity business where the contract state is NY.
- For producers to receive reciprocity for completing this training requirement with other carriers, MassMutual accepts courses from several industry training vendors.

Vendor	Duration	Course Title
RegEd	1 hr. Or 5 hrs.	***Note:*** *If you complete Best Interest training on RegEd's public industry site (course 485_NY or 484_NY), then MassMutual will* ***not*** *receive completion information and you'll need to email a PDF of the certificate to:* AdvisorOperationsHub@massmutual.com
Kaplan	8 hrs.	New York Suitability and Best Interest in Life Insurance and Annuity Transactions: Regulation 187
Quest CE	1 hr.	New York's Best Interest Amendment to Regulation 187 (CE)

****Note:*** *MassMutual also accepts additional training from RegEd, LIMRA, Web CE and other vendors may be considered pending review.*

How Does MassMutual Get My Best Interest Training Completion?

- As long as your social security number is correct in the training vendors system and MassMutual's, then we will receive your completion information automatically.
- It's recommended that you complete the required training at least 24 hours **prior** to submitting an application.

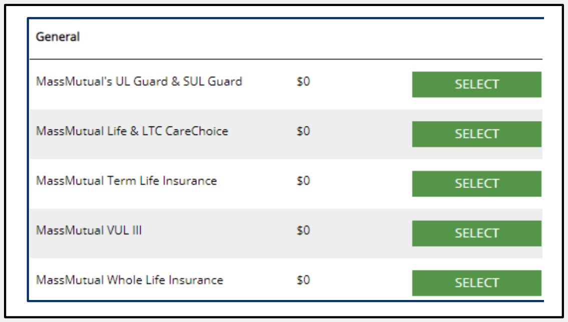
2) Product Training:

You only need to complete the applicable training modules for the products you intend to sell. You'll need to wait approximately 24 hours between the time you complete the training before submitting an application in order to ensure that MassMutual has received your credentialing information. If you have an existing Kaplan account, you'll need to create a new account/profile in order to login to the MassMutual portal.

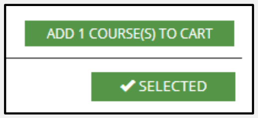
To Access the MassMutual Life Insurance Product Training:

1. https://portal.kaplanfinancial.com/partner/MM/
2. Select the **Create an Account** button and follow the prompts to enter the required information.
   - Note! You must enter your first and last name, email address and social security numbers correctly. Incorrect information means that MassMutual cannot automatically match your course completions for credentialing.

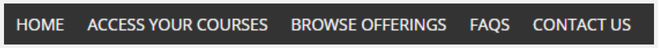
   OR log in if you've created an account previously.



3. Select the **Browse Offerings** button. The list of MassMutual coures appears.
4. Choose the **Select** button for the desired course(s) to add them to the "shopping cart." There is no charge to you.



5. Select the **Add Courses to Cart** button.
6. Select the **Proceed to Checkout** button.
7. Enter your address on the **Shipping Information** screen, then choose the **Save** button.
8. Select the **Continue** button.
9. Select the **Place Order** button.
10. The course(s) are now available for you to complete by selecting the **Access Your Courses** item on the menu bar.



   - At any time, you can add more MassMutual courses by selecting the **Browse Offerings** button.

How Does MassMutual Get Product Training Completion?

- Your completion is automatically sent to MassMutual.