



## The AMS/TAN Annuity Sales Checklist

### 1) Complete registration and access: <https://tan.amsfsg.com/Login.aspx>

- ✓ Select "Fixed Index Annuities"

### 2) Submit your Appointment Application

- ✓ Click Carrier Contracting
- ✓ [SureLC Instructional Video](#)
- ✓ [SureLC Instructional Document](#)
- ✓ Please note that you will not be appointed until you submit business, however you should notify your internal wholesaler or BRM if:
  - a) you're applying for appointment with F&G (*Fidelity & Guaranty*)
  - b) you're applying for appointment for the state of Pennsylvania

### 3) Complete your NAIC Product Specific Training (*under "More Options"*)

- ✓ Identify the carrier and product you wish to write
- ✓ Copy the Product Code, if applicable
- ✓ Click the Product Specific Training link for the applicable carrier
- ✓ Follow instructions

### 4) Complete your State Annuity Training (*including Best Interest*)

- ✓ Check the required training for the state of the application
- ✓ If unsure of the state specific annuity training requirements, contact our preferred vendor RegEd at 800-334-8322 or visit [RegEd Annuities Training Platform](#)

### 5) Complete RightBRIDGE Annuity Wizard Report

- ✓ Click "RightBRIDGE Annuity Wizard link", then "Launch"
- ✓ [RightBRIDGE Annuity Wizard Instructions](#)
- ✓ [RightBRIDGE Tutorial Video](#)

### 6) Submit Annuity Application

- ✓ Click on "Electronic Applications"
- ✓ Click "Launch" to start Firelight e-application
- ✓ [Firelight eApp Training Videos](#)

**Call us if you have any questions!**  
**800.448.4510**