# Kaplan Portal Instructions

Go to www.kfeducation.com/portal and log in using Auto-Registration or Self-Registration. Portal code is WSFG.

**Auto-Registration**
If our licensing department has your valid email address on file, you will receive an email from Kaplan about 30 days prior to the state effective date. The email will provide you with login information, as well as the specific courses that apply to the companies with whom you are appointed. Log in to the "Current Portal Users" section. Click "Log in."
Go to the "Complete Product Training" section below to proceed.

**Self-Registration**
1. If you do not receive an email from Kaplan, you will need to self-register and enroll in a course. Go to www.kfeducation.com/portal. Enter Portal Code "WSFG" in the "New Users" box, select "Create Account."
2. A screen will come up with several paragraphs of text followed by blanks in which to key your contact information. You will need your National Producer Number (NPN) to do this. In the second paragraph of text you will see a "Click Here" that will link you to a site where you can search for your NPN if you do not know it.
3. After you have your NPN, complete all fields with a red asterisk (*), including creating a username and password. Click on "Create Account." This will immediately log you into the site.
4. The home page will come up. In the middle of the screen you will see a Product Training box.
5. In the box, click on the link that says "ENROLL in Your Product Training Course."
6. Under the "Product Training" tab, click "Select," then select all courses from the list that describe the business you write with us.
7. Click on "Proceed to Check Out." Proceed through the Order Confirmation screen that provides a billing and order summary (this is an online course, so there is no charge and no shipping is required). Select submit order.
8. Once the order is submitted, you will receive two emails – a notification that you have been assigned to the product training, and an order confirmation.
9. Proceed through the Confirmation Number screen by selecting Portal Home.

**Complete Product Training**
1. Around the middle of the screen on the home page, you will see a Product Training box. Click on the green tab "Already Enrolled? LAUNCH Course."
2. You will see the list of courses that pertain to the lines of business we have set up for you or that you ordered through the Self Registration. Click "Annuity Product Information."
3. Click "Course Name." The training materials will come up. Review them carefully then close the window.
4. Click "Course Home."
5. In the "Review Test" section, click "Take." Next click "Agree," then "Continue," then "I Agree."
6. Print a certificate if you like, and then click "Course Home." A screen will come up with your results. There is no need to send us the certificate, it will feed electronically.
7. To complete additional courses, click "Portal Home" in the left margin. On the home page, in the "Product Training" section, click on "Already Enrolled? LAUNCH Course."

**Annuity Continuing Education (4-Hour Course) Training Instructions**
1. After logging in via Auto-Registration or Self-Registration, you will see a "State CE Training" box on the main page. Click on "Enroll in Your State Training Course."
2. Under State CE Training, select the state in which you wish to take the CE Course.
3. Select the "Annuities Courses" tab to "order" the required Regulation 275 Annuity Course for the state chosen. Click "Enroll Now" to order. Click "Proceed to Checkout."
4. Next, click "Continue" to select shipping address (note: online courses will not ship anything; however, you cannot bypass this screen).
5. Proceed through the order verification screen that verifies "Shipping Address" and the course ordered. Click "Submit Order."
6. Once the order is submitted, you will receive two emails – a notification that you have been assigned the CE course, and an order confirmation.
7. Click "Portal Home." In the "State CE Training" section, click "Already Enrolled? Launch Courses."
8. Follow the on-screen instructions to complete course and exam.
9. If you complete the CE course on the Kaplan portal, you do not need to fax the certificate to us, it will feed electronically. You may print it for your records. State filing fees are automatically sent upon completion.