
A communication regarding the upcoming NY Regulation 187 was sent out to Active NY Agents on January 9, 2020 to address the requirement for Reg 187 training. Gerber Life will require agents to complete a one-time NY Regulation 187 Suitability and Best Interest training course and proved certification of complete prior to submitting NY business submitted February 1, 2020 and beyond.

We would greatly appreciate any assistance you can provide in getting proof of training submitted either by fax at 877-608-4634 or by emailing glic.appointment.status@gerberlife.com. Please also note that Gerber Life will be providing training on how NY applications will flow through the Agent Portal in the upcoming weeks.

SEE BELOW



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IMPORTANT NEW YORK REG 187 UPDATES

Gerber Life continues to prepare for the February 1, 2020 effective date of the NY DFS Best Interest Regulation 187. Our goal is to make submitting business in New York as easy as possible while ensuring all transactions are in the best interest of the customer.

What is Your Responsibility?

Producers have the responsibility to recommend products based on the customer's best interest. As a result, **before submitting electronic applications through the Agent Portal on or after January 31, 2020, or paper applications signed on or after February 1, 2020, Gerber Life will require Agents to:**

- Review training on all Gerber Life products available in New York
 - Product presentations available on the [Agent Portal](#) in the Agent Documents section under "Training Material" and on iPipeline's Formspipe
- Complete a one-time NY Regulation 187 Suitability and Best Interest training course
 - List of approved classes located on the [NY DFS website](#)¹
 - Submit proof of training to Gerber Life via Fax: 877-608-4634 or Email: glic.appointment.status@gerberlife.com
- Provide customer with a product summary at the time of recommendation
 - Consumer approved product brochures can be found on the [Agent Portal](#) in the Consumer Documents section under "Sales Material" and on iPipeline's FormsPipe

For more information on how to find marketing material available on the Gerber Life Agent Portal, [click here](#).

What is Gerber Life Doing to Support You?

Gerber Life is working hard to ensure we have the tools and processes in place to help our partners navigate NY DFS Best Interest Regulation 187. We have created a

training guide that provides detailed information on our new processes and tools. We are introducing:

- An automated system for determining product suitability integrated into the Agent Portal for e-Applications
 - **RightBridge Reg 187 Product Validation Tool**
 - **Effective January 31, 2020**
- An updated New York application kit for paper submissions that includes new required forms
- Suitability review process also available for all New York paper applications received with a signed date on or after February 1, 2020

The new training guide is available on the Agent Portal and iPipeline's FormsPipe, or [click here](#) to download it now!

Being a Hero is Easy with Gerber Life

Download the Gerber Life "Agent Zone" app for Quick Quotes



Or, visit [Gerber Life's Agent Portal](#)

¹Any costs associated with training courses are the responsibility of the Agent.

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