

Insurance Product Training

Banking, Finance & Fintech

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This guide explains what the tool produces, how to use the output, and what to watch for. The actual output (draft/report) is generated on the tool page.

Background

Builds an insurance product training summary for your team — for each product, how it works, who needs it, key features and the common mis-selling to avoid — with a suitability focus of matching product to need. Use this to train agents and POSPs to advise well. For team certification requirements use the Certification & Licensing Guide.

Purpose of this tool & output

Understand products to advise well

How the output is used

Use the program to understand products deeply so you advise well and avoid mis-selling.

Important cautions

AI-generated training; verify current product features with the insurer.

Companion documents

- Insurance Advisory Framework
- Policy Comparison Helper
- Claim Assistance Guide
- IRDAI Distribution Compliance
- Policy Renewal Management
- POSP / Agent Setup Guide

This is AI-assisted guidance. Verify with a qualified professional before any binding decision. Fees, authorities and processes vary by state and change over time — confirm with your state authority.