



Independent Marketing Group

AGENT ALERT

Revised NAIC Annuity Suitability Model Law

The NAIC recently proposed the adoption of a revised Annuity Suitability Model Law. Separately, the U.S. Securities and Exchange Commission (SEC) released a proposed rule package in May 2018, which included Regulation Best Interest (Reg BI). The SEC finalized Reg BI in June 2019. The final Reg BI establishes a best interest standard of conduct for broker-dealers beyond the existing suitability obligation that applies to federally registered variable annuities.

Please Note State Implementation Effective 1/1/2023: HI, MN, NC, SD

[▶ Current list of states that have adopted the revised model](#)

The Following Training Is Required to Sell Annuities With American National:

American National Annuity Product Training

- Newly Appointed producers must take the IMG All-Encompassing Course located in your Learning Plan.
- Existing Producers who have already taken the IMG All-Encompassing Course satisfy the requirement with the review of the content in this email.

Continuing Education Training

- To ensure all necessary training is completed, please review the Annuity State Suitability Training Guide for individual state requirements.

Find the 1-hour and 4-hour CE courses on the RegEd website under the state you are licensed.

[Go to RegEd Website](#)

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