Idaho Annuity Disclosure form discontinuation

We greatly appreciate our partnership with our Idaho appointed agents, and wanted to share the recent news that the Idaho Annuity Disclosure form (#01ID-AN-2020) is no longer required.

If you write business in Idaho after 9/11/2021, you do not need to submit the disclosure form. Until the application packets are updated, any business written past the 9/11/2021 date, please disregard this form. Any pending business written before 9/11/2021 will still require the form to be completed in good order.

We previously communicated changes in the NAIC’s Suitability in Annuity Transaction Model Regulation (link). Sales in Idaho require compliance with the new documentation, including competition of the Customer Information and Disclosure Acknowledgement or “Appendix A”, which should be kept in your file.

If you have any questions, contact our Suitability team at 888-221-1234 ext. 2313 or by email at suitability@american-equity.com.