Best Interest training now available in West Virginia

As previously announced, the changes for West Virginia went into effect **June 8, 2023**. Producers selling any annuity products, including Asset Care Annuity Funding Whole Life in West Virginia, must take the new training courses to sell these products.

You can take the course on your usual training platform or the <u>Annuity and Best Interest Annuity Training Program</u>. Existing producers in West Virginia must update their training by **Dec. 8, 2023**. New producers must take the new Best Interest Annuity Suitability four-hour training before solicitation of annuity applications.

Submitting CE certificates

After you complete your NAIC Annuity Suitability and Best Interest Training and receive your CE certificates, you can email your certificates to us. We recommend you email them when you receive them; there is no reason to wait.

New producers' guide and forms required to submit annuity applications

In states that have adopted the Best Interest changes, producers are required to use:

- <u>Best Interest Annuity Suitability Policies and Procedures Producers' Guide</u>, all other states will continue using the prior version of the guide.
- <u>Best Interest Consumer Suitability Due Diligence Questionnaire, I-22733 (BI)</u>, all other states will continue using the original questionnaire, I-22733, except where state variations apply.
- <u>Producer Compensation Disclosure for Annuities (I-34191)</u>, is required at the time of submitting an annuity application in states that have approved Best Interest.

In eApp, you can submit the original suitability questionnaire until the updated one is available.

"Where and When" state chart

Find state adoptions, training requirements and deadlines around Best Interest and Suitability in Annuity Transactions on our <u>state chart</u>. We update the chart on a rolling basis.

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