Compliance Bulletin

ANNUITIES REMINDER NOTIFICATION

corebridge financial

Product-Specific & Best Interest/General Annuity Training Requirements

The Corebridge Financial product-specific training is required ***in all states*** and a state insurance department approved best interest/general annuity training ***in most states*** must be completed by a financial professional prior to solicitation of the first annuity sale.

Corebridge Financial Product-Specific Training Requirement

The 2010 NAIC Suitability in Annuity Transactions Model Regulation (NAIC 2010 Model)[1] requires completion of product-specific training for the annuity being sold.

With respect to the few states that have not adopted the NAIC 2010 Model, compliance with the product-specific training is required. This is because the Harkin Amendment requires compliance nationwide with the NAIC 2010 Model and any successor NAIC model regulation.

State Approved Best Interest/General Annuity Training Requirement

A majority of state insurance departments approved a best interest/general annuity training requirement for the sale of an annuity product. Please note that in some cases, a best interest/general annuity training completed for one state may also satisfy the training requirement in another state. In other cases, some states do not consider the training as reciprocal, and credit will not be provided.

Product-Specific & Best Interest/General Annuity Training Requirement

If the appropriate training has not been completed prior to the sale, then **a new application** (or a re-signed and re-dated application signed by both the financial professional and applicant) will need to be submitted with a signature date after the training has been completed.

Financial professionals must follow the direction of their agency or broker-dealer on where to access and complete the required trainings.

Questions? We're here to help.

If you have questions, please contact your agency, broker-dealer, or the Corebridge Sales Desk. Corebridge contact information can be found at www.corebridgefinancial.com by clicking on the Support link.

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[1] Certain states adopted the NAIC 2010 Model, but have not yet adopted revision to the NAIC 2010 Model that added a best interest standard of care for the solicitation, recommendation, and issuance of annuity contracts. Corebridge has previously communicated the training requirements applicable in the states that adopted the revision.

Annuities issued by **American General Life Insurance Company** (AGL), Houston, TX, except in New York, where issued by **The United States Life Insurance Company in the City of New York** (US Life). The Elite line of annuities is issued by The Variable Annuity Life Insurance Company (VALIC), Houston, TX in all states, except New York. Variable annuities are distributed by AIG Capital Services, Inc. (ACS), member FINRA.

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