

Best Interest training now available in New Hampshire and Utah

New Hampshire and Utah have updated the requirements around Best Interest and Suitability in annuity transactions, effective Feb.16, 2024, in New Hampshire and July 1, 2024, in Utah. Producers selling any annuity products, including Asset Care[®] Annuity Funding Whole Life in New Hampshire and Utah, must take a new training course to sell these products.

Training through OneAmerica Financial

If you have previously completed the four-hour state generic annuity suitability course, you have the option to take:

- the one-hour catch-up training course on Annuity Best Interest *or*
- the newly created four-hour course on Annuity Best Interest Suitability

If you have not completed the original four-hour course, you are required to complete the **four-hour course on Annuity Best Interest Suitability** before solicitation of annuity applications.

You can take the course on your usual training platform or the [OneAmerica Annuity and Best Interest Annuity Training Program](#).

In Utah, producers may take the “**Catch-Up Best Interest 1-hour Training**” course if they were licensed before 7/1/24 and have completed both:

- “Generic Annuity Suitability 4-hour Training” course in another NAIC state prior to 7/1/24; and
- Product specific training.

The deadline to complete training is August 16, 2024, in New Hampshire and July 1, 2025, in Utah.

Submitting CE certificates

If you take the training:

- Through the OneAmerica Annuity and Best Interest Annuity Training Program, your course completion date will automatically be added to the site. No further action is required.
- On another platform, you must email your certificates to us. We recommend you email them when you receive them; there is no reason to wait.

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Note: The additional training requirements pertain only to the state generic annuity suitability training. OneAmerica product training has not changed.

New producers' guide and forms required to submit annuity applications

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

- [Best Interest Annuity Suitability Policies and Procedures Producers' Guide](#); all other states will continue using the [prior version of the guide](#).
- [Best Interest Consumer Suitability Due Diligence Questionnaire, I-22733 \(BI\)](#); all other states will continue using the prior version of the questionnaire, I-22733. State specific forms may apply.
- [Producer Compensation Disclosure for Annuities \(I-34191\)](#) is required at the time of submitting an annuity application in states that have approved Best Interest. State specific forms may apply.

“Where and When” state chart

Find state adoptions, training requirements and deadlines around Best Interest and Suitability in Annuity Transactions on our [state chart](#). We update the chart on a rolling basis.

Products issued and underwritten by The State Life Insurance Company[®] (State Life), Indianapolis, IN, a OneAmerica company that offers the Care Solutions product suite. Asset Care[®] form numbers: ICC18 L302 SP; ICC18 SP JT, ICC18 R537, ICC18 R538, ICC18 SA39 and ICC18 R540; L302, L302 JT, L302 SP, L302 SP JT, R537, R538, SA39 and R540. Annuity Care[®] form numbers: SA34 and R508. Annuity Care[®] II form number: SA35. Indexed Annuity Care[®] form number: SA36, R529 PPA, R529, R530 PPA and R530. Not available in all states or may vary by state.

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