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Annuity Continuing Education Requirements by State

As of January 10, 2023

Care has been taken to provide accurate information in the subject matter provided within this document. This information is provided with the understanding that The Success Family of Continuing Education Companies nor its' employees are engaged in providing legal advice or council.

If the date above is more than a few weeks old you may want to download a current version of this document by visiting the link below:

<https://successce.com/state-annuity-ce-requirements/>

The first three pages of this document list, in tabular format, all of the current and proposed annuity training requirements by state.

The body of this document begins with a clickable table of contents which leads to a summary of each state annuity training requirement including a link to the full text of each rule or law discussed.

Regulation Best Interest Key
Approved to satisfy Reg. Best Interest Requirement
Course No Longer Available
State Announced Effective Date: Courses Pending Approval
State Regulation Pending: Check Back for Updates

Success Continuing Education, Inc.

ANNUITY REQUIREMENTS

For more detailed information on your Specific State Annuity Requirement, please click on the name of your state.

State	Annuity Effective date	State DOI Annuity Course #	Reg. Best Interest Effective Date	State DOI Reg. Best Interest 4 Hour Course #	State DOI Reg. Best Interest 1 Hr Course #	Reg. Best Interest 1 Hr Course: Last Available Date
					(Update to previous State Annuity Training)	(After this date, All agents must take 4 hour Reg BI course to sell annuity products)
Alaska	1/1/2017	10412	11/23/2022	6000135117	600013511	6/15/2023
Alabama	10/16/2011	16653	1/1/2022	6000107697	6000107677	6/30/2022
Arizona	1/1/2018	106938	1/1/2021	106632	106760	7/1/2021
Arkansas	Not Currently Required	186916	7/8/2021	6000093760	6000093761	1/7/2022
California	Initial 8-Hour	1/1/2005				
	Follow Up 4-Hour	1/1/2005				
Colorado	4/1/2011	49576	11/1/2022	64350	64349	5/1/2023
Connecticut	2/18/2021	111570	3/1/2022	6000115030	6000113845	9/1/2022
Delaware	6/1/2017	6000003971	8/1/2021	6000093609	6000093588	1/31/2022
District of Columbia	6/24/2011	3661				
Florida Product	10/1/2013	78516				
Georgia	3/1/2016	40071				
Hawaii	1/1/2012	LH209818	1/1/2023	6000138431	6000138650	7/31/2023
Idaho	4/4/2013	3184690	7/1/2021	3195714	3195715	12/31/2021
Illinois	9/26/2011	60194				
Indiana	7/1/2011	23145				
Iowa	5/1/2011	83375	1/1/2021	105752	106085	7/1/2021
Kansas	6/1/2013	979949	pending			
Kentucky	1/1/2012	C09468	1/1/2022	C13918	C13205	6/30/2022
Louisiana	8/15/2012	20504				
Maine	11/1/2015	20074	1/1/2022	27789	n/a	7/1/2022
Maryland	11/1/2011	9468	10/8/2022	110138	110139	4/31/2023
Massachusetts	7/1/2016	C09468				
Michigan	6/1/2013	81031	6/29/2021	83943	83765	12/29/2021
Minnesota	6/1/2013	1015470	1/1/2023	1034232	1034233	6/1/2023
Mississippi	4/10/2013	12891	1/1/2022	22952	22953	7/1/2022
Missouri	3/30/2017	17000418				
Montana	1/1/2018	State Prohibits Publishing Course ID	10/1/2021	6000102614	6000102573	4/1/2022
Nebraska	7/19/2012	30723	7/1/2021	6000098481	6000098478	12/31/2021
Nevada	Not Currently Required		pending			
New Hampshire	1/1/2015	470105				
New Jersey	2/4/2013	88891412				
New Mexico	Not Currently Required	54287	10/1/2022	6000131275	6000131263	4/1/2023
New York Reg. 187 *	8/1/2019	State Prohibits Publishing Course ID				
North Carolina	Not Currently Required	9468	1/1/2023	217445	217446	7/1/2023
North Dakota	8/1/2011	1895	1/1/2022	6000099599	6000099582	7/1/2022
Ohio	7/1/2011	33828	2/14/2021	68553	68552	8/14/2021
Oklahoma	7/14/2010	1017105				
Oregon	8/1/2011	37310				
Pennsylvania **	12/26/2018	129039	6/20/2022	134267	134268	12/20/2022
Rhode Island	6/1/2011	6000035061	4/2/2021	6000083879	6000083896	10/1/2021
South Carolina	9/25/2011	132967	5/27/2022	6000124212	6000124208	11/27/2022
South Dakota	7/1/2012	1273374	10/1/2022	1282599	1282600	3/1/2023
Tennessee	11/1/2015	28015				
Texas	4-Hr Annuity Certification	4/1/2010				
	8-Hr Annuity CE	4/1/2010	9/1/2021	128288	128289	6/29/2022
Utah	3/26/2012	25525				
Vermont	Not Currently Required					
Virginia	4/1/2017	216365	9/1/2021	223339	223340	3/1/2022
Washington	3/29/2012	618881	pending			
West Virginia	7/1/2011	105660				
Wisconsin	5/1/2011	64808	10/1/2022	60001247449	6000124732	4/1/2023
Wyoming	9/26/2014	19395	1/1/2023	34644	34645	7/1/2023

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States with Adopted Annuity Training Requirements

Alabama Annuity Training Requirement:

The state of Alabama has adopted changes to the Suitability in Chapter 482 -1-137 on in June 2021 to Require the Regulation Best Interest Annuities Training.

Alabama Regulation Best Interest - Annuity Training Requirement – Effective: 1/1/2022

- Licensees who sell annuity products need to complete a new Regulation Best Interest – Annuities Course (Reg BI)
- Producers that completed the 4-hour Annuity course prior to the Reg BI effective date may take either the 1-hour Reg BI or the new 4-hour Reg BI course.
- Producers who have not completed the 4-hour Annuity course must take the Reg BI 4-hour course prior to selling annuities.
- Meeting a substantially similar training requirement in another state will meet this requirement.

Link to full text of Alabama regulation: <https://www.aldoi.gov/pdf/legal/137r-2021.pdf>

Link to full text of the Alabama law affecting agent training requirements:

www.alabamaadministrativecode.state.al.us/docs/ins/482-1-137.pdf



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Alaska Annuity Training Requirements:

Alaska Regulation Best Interest - Annuity Training Requirement – Effective: 11/23/2022

- Licensees who sell annuity products need to complete a new Regulation Best Interest - Annuities Course (Reg BI) prior to selling annuities.
- Producers that completed the 4-hour Annuity course prior to Reg BI effective date may take either 1-hour Reg BI or the new 4-hour Reg BI course before 6/15/2023
- Producers who have not completed the 4-hour annuity training must take the Reg BI 4-hour course prior to selling annuities
- Meeting a substantially similar training requirement in another state will meet this requirement.

Alaska has amended Title 3 of the Alaska Administrative Code as part of adopting the current NAIC Suitability in Annuity Transactions Model Regulations.

Effective Date: 10/16/2011

Below is a brief summary of the agent continuing education/training requirements contained in the Notice of Proposed regulations.

- Producers licensed to sell, solicit or negotiate annuities on or before 10/16/2011 must complete a one-time 4 hour Annuity Training course before 4/16/2012 in order to continue to sell annuities.
- Individuals who obtain a life insurance license after 10/16/2011 must complete this training before selling, soliciting or negotiating annuity products.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Carrier is responsible for providing product specific training. **NOTE:** The training deadline for product specific training is 1/16/2012.

Link to full text of Alaska regulation: <http://www.legis.state.ak.us/basis/aac.asp#3.26.778>



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Arizona Annuity Training Requirements

The state of Arizona has adopted the Regulation Best interest Annuity Training Requirement with passage of ARS 20-1243.07 and Section 8 on June 5th, 2020

Regulation Best interest – Annuities Training requirement – Effective 01/01/2021

- Licensees who sell annuity products need to complete a new Regulation Best Interest – Annuities Course (Reg BI)
- Producers who have not completed the 4-hour Annuity course must take the Reg BI 4-hour course prior to selling annuities.
- Meeting a substantially similar training requirement in another state will meet this requirement.

Link to Full information for Arizona Regulation Best Interest: <https://www.azleg.gov/legtext/54leg/2R/laws/0090.pdf>



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Arkansas Annuity Training Requirements

The state of Arkansas has adopted changes to the Suitability in Annuities Rule 82 on December 29, 2020 to Require the Regulation Best Interest Annuities Training.

Arkansas Regulation Best Interest – Annuities Training Requirement – Effective 07/08/2021

- Licensees who sell annuity products need to complete a new Regulation Best Interest – Annuities Course (Reg BI)
- Producers who have not completed the 4-hour Annuity course must take the Reg BI 4-hour course prior to selling annuities.
- Meeting a substantially similar training requirement in another state will meet this requirement.

Producers who hold a life insurance line of authority on the effective date and desire to sell annuities, shall complete the 4-hour Reg BI course within 6 months after the effective date prior to selling annuity products.

Link to Full information for Arkansas Regulation Best Interest:

<https://insurance.arkansas.gov/uploads/resource/documents/7-2021.pdf>



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California Annuity Training Requirement Currently Effective:

Initial 8 Hour Annuity Training Requirement:

- Prior to selling annuities in California, producers must complete an initial **8-hour**, state-approved annuity training course.
- This requirement applies to resident and non-resident producers.

Ongoing 4 Hour Annuity Training Requirement:

- After completion of the initial 8-hour training requirement, producers must complete a **4-hour**, state-approved annuity CE course during each 2-year license term to continue selling annuities.
- This requirement applies to resident and non-resident producers.
- At this point in time it appears that California will not be reciprocal with training taken in other states.



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Colorado Annuity Training Requirement:

Colorado Regulation Best Interest - Annuity Training Requirement – Effective: 10/08/2022

- Licensees who sell annuity products need to complete a new Regulation Best Interest - Annuities Course (Reg BI) prior to selling annuities.
- Producers that completed the 4-hour Annuity course prior to Reg BI effective date may take either 1-hour Reg BI or the new 4-hour Reg BI course before 5/1/2023
- Producers who have not completed the 4-hour annuity training must take the Reg BI 4-hour course prior to selling annuities
- Meeting a substantially similar training requirement in another state will meet this requirement.

Annuity Training Requirement Effective 04/01/11:

- Producers who hold a life insurance line of authority on 4/1/11 must complete a one-time 4 hour Annuity Training course by 10/1/11.
- Individuals who obtain a life insurance line of authority on or after 4/1/11 may not engage in the sale of annuities until they have completed this training.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Carrier is responsible for providing product specific training.

Link to full text of Colorado Regulation:

<https://www.sos.state.co.us/CCR/GenerateRulePdf>.



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Connecticut Annuity Training Requirements:

Connecticut Regulation Best Interest - Annuity Training Requirement – Effective: 3/1/2022

- Licensees who sell annuity products need to complete a new Regulation Best Interest - Annuities Course (Reg BI) prior to selling annuities.
- Producers who have not completed the 4-hour annuity training must take the Reg BI 4-hour course prior to selling annuities.
- Meeting a substantially similar training requirement in another state will meet this requirement.

Link to see the full Regulation:

<https://eregulations.ct.gov/eRegsPortal/Search/getDocument?guid=%7bB004417B-0000-C4D1-9F8F-EF3EFAC415DA%7d>

Connecticut has adopted amendments and additions to the Regulations of Connecticut State Agencies which require annuity training.

Below is a brief summary of the agent continuing education/training requirements.



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Delaware Annuity Training Requirements:

Delaware Regulation Best Interest - Annuity Training Requirement – Effective: 8/1/2021

- Licensees who sell annuity products need to complete a new Regulation Best Interest – Annuities Course (Reg BI)
- Producers who have not completed the 4-hour Annuity course must take the Reg BI 4-hour course prior to selling annuities.
- Meeting a substantially similar training requirement in another state will meet this requirement.

Link to Full text of Delaware Regulation Best Interest:

<https://regulations.delaware.gov/register/december2020/proposed/24%20DE%20Reg%20533%2012-01-20.htm>



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District of Columbia Annuity Training Requirement:

Annuity Training Requirement Effective 06/24/2011:

- Producers holding a life line of authority prior to 6/24/2011 and who desire to sell annuities must complete a one-time 4 hour Annuity Training course by 12/24/2011.
- Individuals who obtain a life insurance line of authority on or after 6/24/2011 must complete this training before selling annuities.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Carrier is responsible for providing product specific training.

Link to full text of District of Columbia Regulation:

<http://www.dcregs.dc.gov/Gateway/ChapterHome.aspx?ChapterNumber=26-A84>



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Florida Suitability Training Currently Effective:

- Resident agents licensed to sell life insurance must complete at least 5 hours of continuing education in Law and Ethics each continuing education compliance period. Licensees may use these hours to satisfy their ethics continuing education requirements.
- This requirement only applies to Florida resident agents.

Florida Annuity Training Requirement Effective 10/1/2013:

Florida has passed Senate Bill 166 with an effective date of 10/1/2013.

This annuity product training required by this bill is in addition to the current suitability training in effect in Florida (see above).

Annuity Training Required in Senate Bill 166:

- Agents must complete product training on each annuity product prior to selling that annuity product.
- Carrier is responsible for providing product specific training.
- This Training applies to resident and nonresident agents

In addition to the annuity training requirements listed above Senate Bill 166 also makes changes that are important to individual agents. Below is a partial list of changes; however, we encourage each agent to read the entire 6 page bill to better understand their responsibilities under the revised law.

- This Bill extends the annuity suitability requirements that existed prior to 10/1/2013 to all annuity sales, regardless of age of the annuitant or applicant.
- Replacement and Suitability forms must be received by carrier within 10 days of execution.

Link to full text of Florida Senate Bill 166: <http://laws.flrules.org/2013/163>



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Georgia Annuity Training Requirement:

This rule goes into effect March 1st, 2016.

Below is a brief summary of the Agent continuing education/training requirements contained in the Proposed Rule making.

- Producers licensed to sell, solicit or negotiate annuities prior to the effective date must complete a one-time 4 hour Annuity Training course within 6 months of the effective date in order to continue to sell annuities.
- Individuals who obtain a life insurance license on or after the effective date must complete this training before selling, soliciting or negotiating annuity products.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Carrier is responsible for providing product specific training.

Link to full text of the Georgia Proposal affecting agent training requirements:

<http://www.oci.ga.gov/ExternalResources/ANNOUNCEMENTS/2095AR-8202015105842.pdf>



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Hawaii Annuity Training requirements:

Hawaii Regulation Best Interest - Annuity Training Requirement – Effective: 1/1/2023

- Licensees who sell annuity products need to complete a new Regulation Best Interest - Annuities Course (Reg BI) prior to selling annuities.
- Producers that completed the 4-hour Annuity course prior to Reg BI effective date may take either 1-hour Reg BI or the new 4-hour Reg BI course before 7/1/2023
- Producers who have not completed the 4-hour annuity training must take the Reg BI 4-hour course prior to selling annuities
- Meeting a substantially similar training requirement in another state will meet this requirement.

Hawaii has passed Senate Bill 1278 which requires annuity training.

Below is a brief summary of the Agent continuing education/training requirements contained in recently passed Hawaii Senate Bill 1278.

- Producers authorized to sell life or accident and health or sickness insurance and who engage in the sale of annuity products must complete a one-time 4 hour Annuity Training by January 31, 2012.
- Any insurance producer who obtains a life insurance line of authority after January 31, 2012, may not engage in the sale of annuities until they have completed a one-time 4 hour annuity training course.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Carrier is responsible for providing product specific training.

Follow the Link below to view the entire text of Hawaii Senate Bill 1278

<http://www.capitol.hawaii.gov/session2011/Bills/SB1278 .pdf>



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Idaho Annuity Training Requirements:

Idaho has adopted the regulation best interest training requirement as a part of House bill No. 79- annuities consumer protections act.

Idaho Regulation Best Interest - Annuity Training Requirement – Effective: 7/1/2021

- Producers who engage in the sale of annuities must complete a one-time 4-hour Regulation Best Interest – Annuities (Reg BI) training course prior to selling annuity products.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- This requirement is separate from the Indexed Products requirement

Link to Full Idaho Regulation Best interest Bill: <https://legislature.idaho.gov/wp-content/uploads/sessioninfo/2021/legislation/H0079.pdf>

Idaho has adopted amendments to IDAPA 18.01.09 to require produce annuity training.

The effective date is 4/4/2013

Below is a brief summary of the agent continuing education/training requirements contained in the proposed changes.



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Illinois Annuity Training Requirements:

Illinois has adopted amendments to Rule 3120, Suitability in Annuity Transactions.

The effective date is 9/26/2011

Below is a brief summary of the agent continuing education/training requirements contained in the proposed changes.

- All producers licensed to sell, solicit or negotiate annuities (regardless of date of licensure) must complete a one-time 4 hour Annuity Training course by 7/1/2012 to sell annuities.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Carrier is responsible for providing product specific training.

Link to full text of Illinois proposed regulation changes:

http://www.cyberdriveillinois.com/departments/index/register/register_volume35_issue41.pdf

Note: This is a link to the Illinois Register, Volume 35, Issue 41, Oct 7, 2011. This is a 476 page PDF document. The referenced changes involving annuity suitability training begin on page 390 (cumulative page number 16087) of this document.



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Indiana Annuity Training Requirement:

Indiana has enacted House Bill 1486 and House Bill 1015 this legislative session. HB 1486 makes changes to the agent training requirements related to the sale of annuities and HB 1015 makes changes to the agent training requirements contained within HB 1486.

NOTE:

On 6/30/2011 Indiana DOI issued Bulletin 1804 to explain the annuity training requirements. Follow the link below to access this bulletin. http://www.in.gov/idoi/files/4903_001.pdf

Below is a brief summary of the Annuity Training Requirements of Indian House Bills 1486 and 1015.

- If an individual is licensed with a life authority prior to 01/1/2012 they must complete a one- time 4 hr annuity training course by 7/01/2012 to continue selling annuities.
- If an individual is licensed with a life authority on or after 01/1/2012 they must complete the 4 hr annuity training course prior to selling an annuity product.
- These training requirements apply to resident and non-resident agents.
- Indiana non-resident agents may complete a substantially similar training requirement in another state to meet this requirement.
- Carriers are required to provide product specific training beginning 1/1/2012.

Follow the Link below to view the entire text of the enrolled version of Indiana House Bill 1486.

***NOTE:** This entire bill is 54 pages long and has a working title of "Insurance Matters". This bill covers amendments and additions to many sections of Indiana Insurance Code.*

<http://www.in.gov/legislative/bills/2011/HE/HE1486.1.html>

Follow the Link below to view the entire text of the enrolled version of Indiana House Bill 1015.

***NOTE:** This entire bill is 8 pages long and has a working title of "Insurance Matters". This bill covers amendments and additions to several sections of Indiana Insurance Code.*

<http://www.in.gov/legislative/bills/2011/HE/HE1015.1.html>



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Iowa Annuity Training Requirement Currently Effective:

Iowa has adopted Regulation to require agents to act in the best interest of their customers on May 11, 2020

Iowa Regulation Best Interest - Annuity Training Requirement – Effective: 1/1/2021

- Licensees who sell annuity products need to complete a new 4 Hour Regulation Best Interest – Annuities Course (Reg BI)
- Meeting a substantially similar training requirement in another state will meet this requirement.
- This requirement is separate from the Indexed Products requirement

Link to Legislation: https://iid.iowa.gov/sites/default/files/bi_af.pdf

Link to full text of Iowa Regulation:

<https://www.legis.iowa.gov/docs/iac/agency/09-18-2013.191.pdf>

Scroll to 191-15.68

Iowa Indexed Products Training Requirement Currently Effective:

All insurance producers selling or soliciting Indexed Products in Iowa must complete a one-time 4 hour Indexed Product Course.



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Kansas Annuity Training Requirement:

Kansas has KAR 40-2-149 as part of implementing the newer NAIC standards for annuity suitability.

Below is a brief summary of the agent continuing education/training requirements contained in KAR 40-2-149:

- Insurance producers licensed to sell, solicit or negotiate annuities prior to 06/1/13 must complete a one-time 4 hour Annuity Training course by 12/1/2013 in order to continue to sell annuities.
- Individuals who obtain a life insurance license on or after 06/1/2013 must complete this training before selling, soliciting or negotiating annuity products.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Carrier is responsible for providing product specific training.



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Kentucky Annuity Training Requirement:

Kentucky has adopted an amendment of KAR 806 12:120 to include best interest obligation.

Kentucky Regulation Best Interest - Annuity Training Requirement – Effective: 01/01/2022

- Licensees who sell annuity products need to complete a new Regulation Best Interest - Annuities Course (Reg BI) prior to selling annuities.
- Producers who have not completed the 4-hour annuity training must take the Reg BI 4-hour course prior to selling annuities
- Meeting a substantially similar training requirement in another state will meet this requirement.



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Louisiana Annuity Training Requirement:

House Bill LA-H1177 was signed by the Governor.

The effective date is 8/15/2012.

Below is a brief summary of the agent continuing education/training requirements contained in the introduced version of House Bill LA-H1177.

- Insurance producers licensed to sell, solicit or negotiate annuities prior to 8/15/2012 must complete a one-time 4 hour Annuity Training course by 1/1/2013 in order to continue to sell annuities.
- Individuals who obtain a life insurance license on or after 8/15/2012 must complete this training before selling, soliciting or negotiating annuity products.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Carrier is responsible for providing product specific training.

Link to Louisiana House Bill LA-H1177:

<http://legis.la.gov/legis/Law.aspx?d=815030>



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Maine Annuity Training Requirement:

Maine gave notice of Proposed rulemaking related to The Best Interest in Annuity Suitability

Maine Regulation Best Interest - Annuity Training Requirement – Effective: 01/01/2022

- Licensees who sell annuity products need to complete a new Regulation Best Interest - Annuities Course (Reg BI) prior to selling annuities.
- Producers who have not completed the 4-hour annuity training must take the Reg BI 4-hour course prior to selling annuities
- Meeting a substantially similar training requirement in another state will meet this requirement.

Link to full Rule: https://www.maine.gov/pfr/insurance/legal/rules/pdf/917_final_rule.pdf



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Maryland Annuity Training Requirement:

Maryland Regulation Best Interest - Annuity Training Requirement – Effective: 10/08/2022

- Licensees who sell annuity products need to complete a new Regulation Best Interest - Annuities Course (Reg BI) prior to selling annuities.
- Producers that completed the 4-hour Annuity course prior to Reg BI effective date may take either 1-hour Reg BI or the new 4-hour Reg BI course before 8/31/2023
- Producers who have not completed the 4-hour annuity training must take the Reg BI 4-hour course prior to selling annuities
- Meeting a substantially similar training requirement in another state will meet this requirement.

Maryland has amended insurance regulations (COMAR 31.09.12) to require annuity training.

The effective date of the amendments is November 1, 2011.

Below is a brief summary of the agent continuing education/training requirements contained in the amendments.

Source: The Maryland Register (Volume 38 Issue 3).

- Insurance producers licensed to sell, solicit or negotiate annuities prior to 11/1/11 must complete a one-time 4 hour Annuity Training course within 6 months of the effective date in order to continue to sell annuities.
- Individuals who obtain a life insurance license on or after 11/1/11 must complete this training before selling, soliciting or negotiating annuity products.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Carrier is responsible for providing product specific training.

Below is a link to the amended Maryland Code of Regulations (COMAR) sections 31.09.12.

http://www.dsd.state.md.us/comar/SubtitleSearch.aspx?search=31.09.12.*



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Massachusetts Annuity Training Requirement:

Massachusetts has given notice of currently effective rulemaking related to annuity suitability.

This rule goes into effect July 1st, 2016

Below is a brief summary of the Agent continuing education/training requirements contained in the Proposed Rule making.

- Producers licensed to sell, solicit or negotiate annuities prior to the effective date (7/1/2016) must complete a one- time 4 hour Annuity Training course within 6 months (12/31/2016) of the effective date in order to continue to sell annuities.
- Individuals who obtain a life insurance license on or after the effective date (7/1/2016) must complete this training before selling, soliciting or negotiating annuity products.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Carrier is responsible for providing product specific training.

Link to full text of the Massachusetts law affecting agent training requirements:

www.mass.gov/courts/docs/lawlib/210-219cmr/211cmr96.pdf



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Michigan Annuity Training Requirement:

Michigan Regulation Best Interest – Annuity Training Requirement – Effective: 6/29/2021

- Licensees who sell annuity products need to complete a new Regulation Best Interest – Annuities Course (Reg BI)
- Producers who have not completed the 4-hour Annuity course must take the Reg BI 4-hour course prior to selling annuities.
- Meeting a substantially similar training requirement in another state will meet this requirement.

Link to Full Michigan Regulation Best Interest: <http://www.legislature.mi.gov/documents/2019-2020/billanalysis/House/pdf/2019-HLA-6112-C0617657.pdf>



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Minnesota Annuity Training Requirement:

Minnesota Regulation Best Interest - Annuity Training Requirement – Effective: 1/1/2023

- Licensees who sell annuity products need to complete a new Regulation Best Interest - Annuities Course (Reg BI) prior to selling annuities.
- Producers that completed the 4-hour Annuity course prior to Reg BI effective date may take either 1-hour Reg BI or the new 4-hour Reg BI course before 7/1/2023
- Producers who have not completed the 4-hour annuity training must take the Reg BI 4-hour course prior to selling annuities
- Meeting a substantially similar training requirement in another state will meet this requirement.

Annuity Training Requirement:

- Agents who hold a life insurance line of authority on 6/1/2013 and desire to sell annuities must complete a one-time 4 hour Annuity Training course by 07/01/2014.
- Individuals who obtain a life insurance line of authority on or after 1/1/2014 may not engage in the sale of annuities until they have completed this training.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement..
- Carrier is responsible for providing product specific training.

Link to full text of Minnesota House file 791.1

<https://www.revisor.mn.gov/laws/?id=54&year=2013&type=0>



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Mississippi Annuity Training Requirement:

Mississippi Regulation Best Interest - Annuity Training Requirement – Effective: 1/1/2022

- Licensees who sell annuity products need to complete a new Regulation Best Interest - Annuities Course (Reg BI) prior to selling annuities.
- Producers who have not completed the 4-hour annuity training must take the Reg BI 4-hour course prior to selling annuities.
- Meeting a substantially similar training requirement in another state will meet this requirement.



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Missouri Annuity Training Requirement:

Missouri has given notice of currently effective rulemaking related to annuity suitability.

This rule goes into effect March 30th, 2017

Below is a brief summary of the Agent continuing education/training requirements contained in the Proposed Rule making.

- Producers licensed to sell, solicit or negotiate annuities prior to the effective date (3/30/2017) must complete a one- time 4 hour Annuity Training course within 6 months (9/30/2017) of the effective date in order to continue to sell annuities.
- Individuals who obtain a life insurance license on or after the effective date (3/30/2017) must complete this training before selling, soliciting or negotiating annuity products.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Carrier is responsible for providing product specific training.

Link to full text of the Missouri law affecting agent training requirements:

<http://www.sos.mo.gov/cmsimages/adrules/csr/current/20csr/20c400-5.pdf>



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Montana Annuity Requirement:

Montana has adopted the Regulation Best Interest Annuity Requirement in Section 6. Section 33-20-807 , MCA on February 22, 2021.

Montana Regulation Best Interest – Annuity Training Requirement – Effective 10/1/2021

- Licensees who sell annuity products need to complete a new 4 Hour Regulation Best Interest – Annuities Course (Reg BI)
- Meeting a substantially similar training requirement in another state will meet this requirement.

Link to Full Bill: <https://leg.mt.gov/bills/2021/LcHtml/LC0098.htm>



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Nebraska Annuity Training Requirement:

Nebraska has adopted the Regulation Best Interest Annuity Requirement in Legislative bill 22 on January 7, 2021.

Nebraska Regulation Best Interest – Annuity Training Requirement – Effective 7/1/2021

- Licensees who sell annuity products need to complete a new 4 Hour Regulation Best Interest – Annuities Course (Reg BI)
- Meeting a substantially similar training requirement in another state will meet this requirement.

Link to full Legislative Bill 22: <https://nebraskalegislature.gov/FloorDocs/107/PDF/Intro/LB22.pdf>

Annuity Training Requirement:



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Nevada has no Annuity requirement at this time



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New Hampshire Annuity Training Requirement:

Annuity Training Requirement:

- Agents who hold a life insurance line of authority on 1/1/2015 and desire to sell annuities must complete a one-time 4 hour Annuity Training course by 7/1/2015.
- Individuals who obtain a life insurance line of authority on or after 1/15/2015 may not engage in the sale of annuities until they have completed this training.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement..
- Carrier is responsible for providing product specific training.



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New Jersey Annuity Training Requirement:

Annuity Training Requirement:

- All agents who hold a life insurance line of authority and desire to sell annuities must complete a one-time 4 hour Annuity Training course by 08/4/2013.
- Individuals who obtain a life insurance line of authority on or after 8/4/2013 may not engage in the sale of annuities until they have completed this training.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement..
- Carrier is responsible for providing product specific training.



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New Mexico Annuity Training Requirement:

New Mexico has adopted the Regulation Best Interest Annuity Requirement in Legislative bill 22 on January 7, 2021.

New Mexico Regulation Best Interest – Annuity Training Requirement – Effective 10/1/2022

- Licensees who sell annuity products need to complete a new Regulation Best Interest – Annuities Course (Reg BI)
- Producers that completed the 4-hour Annuity course prior to Reg BI effective date may take either 1-hour Reg BI or the new 4-hour Reg BI course before 4/1/2023
- Producers who have not completed the 4-hour Annuity course must take the Reg BI 4-hour course prior to selling annuities.
- Meeting a substantially similar training requirement in another state will meet this requirement.



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New York DFS Final version of amendments to Regulation 187:

New York adopts a Best Interest Standard in the sale of Life Insurance and Annuities. The amended Regulation 187 will become effective for **annuity products** on **August 1st, 2019** and for **life insurance products** on **February 1st, 2020**.

New York amended regulation requires an Agent Training Requirement:

New York requires that all Resident and Non-Resident agents be properly trained on the Annuities and Life Insurance Products that they sell. New York requires that agents take a 4 hour course in the subject of "Suitability and Best Interest in Life Insurance and Annuity Transactions" - (*amended Regulation 187*).

Carrier is responsible for providing Product Specific Training.

Link to full text of New York final version of New York Regulation 187:

https://www.dfs.ny.gov/docs/insurance/r_finala/2018/rf187a1txt.pdf



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North Carolina Annuity Training Requirement:

North Carolina Regulation Best Interest - Annuity Training Requirement – Effective: 1/1/2023

- Licensees who sell annuity products need to complete a new Regulation Best Interest - Annuities Course (Reg BI) prior to selling annuities.
- Producers that completed the 4-hour Annuity course prior to Reg BI effective date may take either 1-hour Reg BI or the new 4-hour Reg BI course before 7/1/2023
- Producers who have not completed the 4-hour annuity training must take the Reg BI 4-hour course prior to selling annuities
- Meeting a substantially similar training requirement in another state will meet this requirement.



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North Dakota Annuity Training Requirement:

North Dakota has adopted House Bill No.1160 to amend previous Annuity Requirements to include Regulation Best Interest

North Dakota Regulation Best Interest – Annuity Training Requirement – Effective: 1/1/2022

- Licensees who sell annuity products need to complete a new Regulation Best Interest – Annuities Course (Reg BI)
- Producers who have not completed the 4-hour Annuity course must take the Reg BI 4-hour course prior to selling annuities.
- Meeting a substantially similar training requirement in another state will meet this requirement.



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Ohio Annuity Training Requirement:

Ohio has adopted Regulation Best interest under Rule 3901-6-13 Suitability in annuity transactions

Ohio Regulation Best Interest – Annuity Training Requirement – Effective: 2/14/2021

- Producers who engage in the sale of annuities must complete a one-time 4-hour Regulation Best Interest – Annuities (Reg BI) training course prior to selling annuity products.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- This requirement is separate from the Indexed Products requirement

Link to full OH Rule 3901-6-13: <https://codes.ohio.gov/ohio-administrative-code/rule-3901-6-13>

Link to full text of Ohio Re-adopted Rule 3901-6-13: [http://www.registerofohio.state.oh.us/pdfs/3901/0/6/3901-6-13 PH FF N RU 20110203_0922.pdf](http://www.registerofohio.state.oh.us/pdfs/3901/0/6/3901-6-13_PH_FF_N_RU_20110203_0922.pdf)



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Oklahoma Annuity Training Requirement:

Annuity Training Requirement Currently Effective:

- Producers who held a life insurance line of authority prior to 07/14/2010 and desires to sell annuities must complete a one-time 4 hour Annuity Training course by 07/14/2011.
- Individuals who obtain a life insurance line of authority on or after 07/14/2010 may not engage in the sale, solicitation or negotiation of annuities until this training has been completed.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement.

Link to full text of Oklahoma Regulation:

<http://www.ok.gov/oid/documents/SUBCHAPTER%203.%20%20PRODUCERS,%20BROKERS%20AND%20LIMITED%20LINES%20PRODUCERS.pdf>

Scroll to 365:25-3-21



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Oregon Annuity Training Requirement:

On February 3, 2011 Oregon amended and renumbered OAR 836-080-170 to 836-080-0190 related to annuity suitability.

Below is a brief summary of the affect on agent continuing education/training requirements as a result of the changes noted above:

- Oregon requires 4 hours of annuity training for all agents selling annuity products. The “Effective Date and Operative Date” section of this new requirement states: “Insurance producers who hold a life insurance line of authority on the effective date of OAR 836-080-0170 to 836-080-0190 and who desire to sell annuities shall complete the requirements of OAR 836-080-0183 (where the 4 hour annuity training requirement is located) within six months after July 1, 2011.” This would indicate that agents licensed on 7/1/2011 must complete the 4 hour annuity training by 1/1/2012 to sell annuities.
- The “Effective Date and Operative Date” section of this new requirement also states “OAR 836-080-0170 to 836-080-0190 and the amendments to OAR 836-080-0090 become operative on July 1, 2011, except that the requirement under OAR 836-080-0183 (2) shall become operative on August 1, 2011 or six months after the director determines that the requisite training is available”. This appears to indicate that the effective date may be delayed if annuity courses are not available. This is unlikely as Success CE already has the course approved in Oregon.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Carrier is responsible for providing product specific training.

Text of the final regulation text may not be published before the regulation's effective date due to the state's rulemaking and publishing process.

Link to full text of Oregon changes affecting agent training requirements:

http://arcweb.sos.state.or.us/pages/rules/oars_800/oar_836/836_080.html

scroll to 836 080 170.



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Pennsylvania Annuity Training Requirement:

Pennsylvania Regulation Best Interest – Annuity Training Requirement – Effective: 6/20/2022

- Licensees who sell annuity products need to complete a new Regulation Best Interest – Annuities Course (Reg BI)
- Producers who have not completed the 4-hour Annuity course must take the Reg BI 4-hour course prior to selling annuities.
- Meeting a substantially similar training requirement in another state will meet this requirement.

On December 26th, 2018 the Pennsylvania Department of Insurance ("PID") will be implementing new procedures regarding the suitability of annuity transactions, pursuant to Act 48 of 2018 ("Act 48") - [Act 48, Section 403.1-B]

This rule goes into effect December 26th, 2018:

- Requires licensed insurance producers with the authority to sell annuities in Pennsylvania to complete at least 4 continuing education credits in an approved annuity training course.
- The continuing education credit requirement shall be met on or before the end of the insurance producer's next complete license period occurring after the effective date, 12/26/2018.
- Individuals licensed on or after 12/26/2018, the requirement shall be met on or before the end of the insurance producer's first license period.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Carrier is responsible for providing product-specific training.

Link to full text of Pennsylvania Regulation: [Click Here](#)



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Rhode Island Annuity Training Requirement:

Rhode Island announced its new regulation best interest requirement in Insurance Bulletin Number 2021 -1

Rhode Island Regulation Best Interest – Annuity Training Requirement – Effective: 4/2/2021

- Licensees who sell annuity products need to complete a new Regulation Best Interest – Annuities Course (Reg BI)
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Producers who have not completed the 4-hour Annuity course must take the Reg BI 4-hour course prior to selling annuities.
-

Link to full Regulation: <https://rules.sos.ri.gov/regulations/part/230-20-25-1/11225>



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South Carolina Annuity Training Requirement :

South Carolina Regulation Best Interest – Annuity Training Requirement – Effective: 5/27/2022

- Licensees who sell annuity products need to complete a new Regulation Best Interest – Annuities Course (Reg BI)
- Producers that completed the 4-hour Annuity course prior to Reg BI effective date may take either 1-hour Reg BI or the new 4-hour Reg BI course before 11/27/2022
- Producers who have not completed the 4-hour Annuity course must take the Reg BI 4-hour course prior to selling annuities.
- Meeting a substantially similar training requirement in another state will meet this requirement.

Link to full Regulation: <https://rules.sos.ri.gov/regulations/part/230-20-25-1/11225>

Annuity Training Requirement Effective 09/25/11: New Regulation 69-29

- Insurance producers who hold a life insurance line of authority prior to 09/25/2011 and who desire to sell annuities shall complete a one-time 4 hour Annuity Training Course by 03/25/2012.
- Individuals who obtain a life insurance line of authority on or after 09/25/2011 may not engage in the sale of annuities until they complete this Annuity training requirement.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Carrier is responsible for providing product specific training.



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South Dakota Annuity Training Requirement:

South Dakota Regulation Best Interest – Annuity Training Requirement – Effective: 10/1/2022

- Licensees who sell annuity products need to complete a new Regulation Best Interest – Annuities Course (Reg BI)
- • Producers that completed the 4-hour Annuity course prior to Reg BI effective date may take either 1-hour Reg BI or the new 4-hour Reg BI course before 3/1/2022
- Producers who have not completed the 4-hour Annuity course must take the Reg BI 4-hour course prior to selling annuities.
- Meeting a substantially similar training requirement in another state will meet this requirement.

Link to full Regulation: <https://rules.sos.ri.gov/regulations/part/230-20-25-1/11225>

- Agents who hold a life insurance line of authority on 7/1/2012 and desire to sell annuities must complete a one-time 4 hour Annuity Training course by 1/1/2013.
- Individuals who obtain a life insurance line of authority on or after 7/1/2012 may not engage in the sale of annuities until they have completed this training.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Carrier is responsible for providing product specific training.

Link to full text of the enrolled version South Dakota Senate Bill 32:

<http://sdlegislature.gov/docs/legsession/2012/Bills/SB32P.htm>



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Tennessee Annuity Training Requirement:

On January 5, 2011 Tennessee gave notice of proposed rulemaking related to annuity suitability.

This rule goes into effect November 1st, 2015.

Below is a brief summary of the Agent continuing education/training requirements contained in the Proposed Rule making.

- Producers licensed to sell, solicit or negotiate annuities prior to the effective date must complete a one-time 4 hour Annuity Training course within 6 months of the effective date in order to continue to sell annuities.
- Individuals who obtain a life insurance license on or after the effective date must complete this training before selling, soliciting or negotiating annuity products.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Carrier is responsible for providing product specific training.

Link to full text of the Tennessee Proposal affecting agent training requirements:

http://share.tn.gov/sos/rules_filings/08-01-15.pdf



The Success Family of CE Companies

Texas Annuity Training Requirements:

Texas Regulation Best Interest - Annuity Training Requirement – Effective: 01/01/2022

- Licensees who sell annuity products need to complete a new Regulation Best Interest – Annuities Course (Reg BI)
- Producers who have not completed the 4-hour Annuity course must take the Reg BI 4-hour course prior to selling annuities.
- Meeting a substantially similar training requirement in another state will meet this requirement.

Link to the state information: https://www.tdi.texas.gov/agent/annuity_certifi.html

Texas initial one-time 4hr. annuity suitability training requirement:

- Resident AND non-resident agents are required to complete the 4 hr initial annuity training prior to selling annuities.
- Texas will accept the completion of a substantially similar course in another state to meet this requirement
- Insurers must provide product specific training

Texas ongoing annuity training requirement

- Texas RESIDENT agents must complete 8 hours of ongoing annuity continuing education each license renewal(does not apply to non-resident Texas licensees).
- The initial one-time 4 hr. annuity training listed above counts towards the 8 required hours in the biennium in which the initial course is completed.



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Utah Annuity Training Requirement:

Utah has amended R590-230-1 thru 9 to require insurers to provide product specific training.

Annuity Training in Rule R590-230-1+:

- This rule does not require agents to complete a one-time 4 hour CE course like most of the other states.
- This requirement applies to resident and non-resident producers.
- Carrier is responsible for providing product specific training.
- Enforcement will begin 5/25/2012

Link to amended text of Rule R590-230-1+

<http://www.rules.utah.gov/publicat/code/r590/r590-230.htm>



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Vermont has no Annuity requirement at this time



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Virginia Annuity Training Requirement:

Virginia Regulation Best Interest – Annuity Training Requirement – Effective: 9/1/2021

- Licensees who sell annuity products need to complete a new Regulation Best Interest – Annuities Course (Reg BI)
- Producers who have not completed the 4-hour Annuity course must take the Reg BI 4-hour course prior to selling annuities.
- Meeting a substantially similar training requirement in another state will meet this requirement.



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Washington Annuity Training Requirement:

- Agents who hold a life insurance line of authority on 3/29/2012 and desire to sell annuities must complete a one-time 4 hour Annuity Training course by 9/29/2012.
- Individuals who obtain a life insurance line of authority on or after 3/29/2012 may not engage in the sale of annuities until they have completed this training.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Carrier is responsible for providing product specific training.

Note: The rule should show up on the recently adopted section of the WA DOI website accessible via this link:
<http://www.rules.utah.gov/publicat/code/r590/r590-230.htm>



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West Virginia Annuity Training Requirement:

West Virginia adopted amendments to existing Title 114 Legislative Rule 11B related to Annuity Suitability.

Below is a brief summary of the Agent continuing education/training requirements contained in the amendments to existing WV Title 114 Rule 11B.

- Producers licensed to sell, solicit or negotiate annuities prior to 07/01/2011 must complete a one-time 4 hour Annuity Training course by 12/31/2011 in order to continue to sell annuities.
- Individuals who obtain a life insurance license on or after 07/01/2011 must complete this training before selling, soliciting or negotiating annuity products.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Carrier is responsible for providing product specific training.

Below is a link to the recently amended and adopted Title 114 Legislative Rule 11B:

<http://www.wvinsurance.gov/LinkClick.aspx?fileticket=Fyp7G839d8c%3d&tabid=547>



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Wisconsin Annuity Training requirement:

Wisconsin Regulation Best Interest – Annuity Training Requirement – Effective: 10/1/202

- Licensees who sell annuity products need to complete a new Regulation Best Interest – Annuities Course (Reg BI)
- Producers that completed the 4-hour Annuity course prior to Reg BI effective date may take either 1-hour Reg BI or the new 4-hour Reg BI course before 4/1/2023
- Producers who have not completed the 4-hour Annuity course must take the Reg BI 4-hour course prior to selling annuities.
- Meeting a substantially similar training requirement in another state will meet this requirement.

Annuity Training Requirement Effective 5/1/2011:

- Producers licensed to sell, solicit or negotiate annuities prior to 5/1/2011 must complete a one-time 4 hour Annuity Training course by 11/1/2011.
- Intermediaries who obtain a life insurance license on or after 5/1/2011 must complete this training before selling, soliciting or negotiating annuity products.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Carrier is responsible for providing product specific training.

Link to full text of Wisconsin Regulation: <http://legis.wisconsin.gov/statutes/Stat0628.pdf>

Scroll to 628.347



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Wyoming Annuity Training Requirement:

Wyoming Regulation Best Interest - Annuity Training Requirement – Effective: 1/1/2023

- Licensees who sell annuity products need to complete a new Regulation Best Interest - Annuities Course (Reg BI) prior to selling annuities.
- Producers that completed the 4-hour Annuity course prior to Reg BI effective date may take either 1-hour Reg BI or the new 4-hour Reg BI course before 7/1/2023
- Producers who have not completed the 4-hour annuity training must take the Reg BI 4-hour course prior to selling annuities
- Meeting a substantially similar training requirement in another state will meet this requirement.

Wyoming has an adopted Chapter 64 dealing with annuity suitability.

The effective date is 9/26/2014.

Below is a brief summary of the Agent continuing education/training requirements contained in the Proposed Rule making.

- Producers licensed to sell annuities on or before 9/26/14 must complete a one-time 4 hour Annuity Training course by 3/26/2015 to continue to selling annuities.
- Individuals who obtain a life insurance license after 9/26/2014 must complete the 4 hr. course before selling, soliciting or negotiating annuity products.
- This requirement applies to resident and non-resident producers.
- Meeting a substantially similar training requirement in another state will meet this requirement.
- Carrier is responsible for providing product specific training.

Link to full text of the Wyoming Proposal affecting agent training requirements:

<http://soswy.state.wy.us/Rules/RULES/9459.pdf>