

Annuity Suitability Producer Training Requirements

Producer Training Requirements							
Jurisdiction	Original 2010 annuity suitability regulation adopted	Amended 2020 annuity suitability regulation adopted	State effective date for the amended 2020 annuity suitability regulation	Company product specific annuity training required	4CE training required under the original annuity suitability model regulation	4CE or 1CE annuity suitability training required under the amended annuity suitability regulation	Deadline for licensed producers who previously completed annuity suitability training to complete a new 4CE or 1CE annuity suitability best interest course. Other producers must complete a 4CE annuity suitability best interest course BEFORE soliciting annuities.
AL	X	X	1/1/22	X		X	6/30/22
AK	X	X	11/23/22	X		X	7/14/23
AZ	X	X	12/31/20	X		X	6/30/21
AR		X	7/8/21	X		X	1/1/22
CA*	X	X	1/1/25	X		*See comments located at the bottom of page 2	
CO	X	X	11/1/22	X		X	5/1/23
CT	X	X	3/1/22	X		X	8/30/22
DC	X			X	X		
DE	X	X	8/1/21	X		X	2/1/22
FL		X	1/1/24	X		X	7/1/24
GA	X	X	8/1/23	X		X	2/1/24
HI	X	X	1/1/23	X		X	7/1/23
ID	X	X	7/1/21	X		X	1/1/22
IL	X	X	Effective date 2/3/23 Enforcement date 8/1/23	X		X	2/1/24
IN	X	X	7/1/24	X		X	1/1/25
IA	X	X	1/1/21	X		X	6/30/21
KS	X	X	1/1/24	X		X	7/1/24
KY	X	X	1/1/22	X		X	6/29/22
LA	X	X	9/20/24	X		X	3/20/25
ME	X	X	1/1/22	X		X	7/1/22
MD	X	X	10/8/22	X		X	4/8/23
MA	X	X	Effective 12/9/22. Applies to annuity sales/ recommendations on or after 6/1/23	X		X	6/1/23

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MI	X	X	6/29/21	X		X	12/29/21
MN	X	X	1/1/23	X		X	7/1/23
MS	X	X	1/1/22	X		X	7/1/22
MO	X	X	8/30/24	X		X	2/28/25
MT		X	10/1/21	X		X	3/31/22
NE	X	X	7/1/21	X		X	12/30/21
NV		X	11/15/24	X		X	5/15/25
NH	X	X	Effective date 2/16/24 Compliance date 4/17/24	X		X	8/16/24
NJ	X	X	4/21/25	X		X	10/21/25
NM		X	10/1/22	X		X	4/1/23
NC		X	1/1/23	X		X	7/1/23
ND	X	X	1/1/22	X		X	7/2/22
OH	X	X	2/14/21	X		X	8/13/21
OK	X	X	9/1/23	X		X	2/29/24
OR	X	X	1/1/24	X		X	6/29/24
PA	X	X	6/20/22	X		X	12/20/22
RI	X	X	4/1/21	X		X	9/30/21
SC	X	X	11/27/22	X		X	11/27/22
SD	X	X	1/1/23	X		X	7/1/23
TN	X	X	1/1/24	X		X	6/30/24
TX	X	X	9/1/21	X		X	12/31/21
UT		X	7/1/24	X		X	7/1/25
VT		X	7/5/24	X		X	1/5/25
VA	X	X	9/1/21	X		X	2/28/22
WA	X	X	1/1/24	X		X	7/1/24
WV	X	X	6/8/23	X		X	12/8/23
WI	X	X	10/1/22	X		X	4/1/23
WY	X	X	7/5/23	X		X	1/4/24

*** Existing California life agents on 1/1/25:** Must take CA's new 8-hour annuity course no later than 7/1/25 AND must take CA's new 4-hour annuity course before the next license expiration date even if license expiration is before 7/1/25.

New California life agents after 1/1/25: Must take CA's new 8-hour course before selling annuities AND must take CA's new 4-hour annuity course before license renewal

These training requirements apply to California resident AND nonresident life agents.