

ANNUITY STATE SUITABILITY TRAINING

State Continuing Education Requirements

In addition to a carriers required training, many states require additional continuing education (CE) annuity certification training to comply with the NAIC Model or the Revised NAIC Model.

The states that have adopted the 2010 NAIC Suitability in Annuity Transactions Model Regulation require producers to complete an approved four-hour annuity training course (CE) as part of the licensing requirement for the state. Beginning January 1st, 2020, states have started to adopt the NAIC “Revised Model” which will require agents to complete an additional one or four-hour annuity training course (CE). New producers getting licensed after the effective date will be required to complete an approved four-hour annuity training course (CE) as part of the licensing requirement for the state.

Carrier Specific Continuing Education Requirements

Carrier required training will vary by carrier, check with the each carrier for specific requirements.

Please see following tables for your specific state suitability training requirements.

STATE	NAIC MODEL TRAINING DATES			REVISED MODEL TRAINING DATES		
	NAIC Model Effective Date	For Agents Licensed PRIOR to the Effective date	For Agents Licensed AFTER the Effective Date	Revised Model Effective Date	For Agents Licensed PRIOR to the Effective date	For Agents Licensed AFTER the Effective Date
Alabama	1/1/2017	7/1/2017	1/1/2017	—	—	—
Alaska	10/16/2011	4/16/2012	10/16/2011	—	—	—
Arizona	1/1/2018	1/1/2018	1/1/2018	1/1/2021	7/1/2021	1/1/2021
Arkansas	—	—	—	12/29/2020	6/29/2021	12/29/2020
California	1/1/2012	1/1/2012	1/1/2012	—	—	—
Colorado	4/1/2011	10/1/2011	4/1/2011	—	—	—
Connecticut	2/18/2012	8/18/2012	2/18/2012	—	—	—
Delaware	6/1/2017	12/1/2017	6/1/2017	—	—	—
District of Columbia	6/24/2011	12/24/2011	6/24/2011	—	—	—
Florida	—	—	—	—	—	—
Georgia	3/1/2016	9/1/2016	3/1/2016	—	—	—
Hawaii	1/1/2012	1/31/2012	1/31/2012	—	—	—
Idaho	4/4/2013	10/4/2013	4/4/2013	—	—	—
Illinois	9/26/2011	7/1/2012	9/26/2011	—	—	—
Indiana	7/1/2011	7/1/2012	1/1/2012	—	—	—
Iowa	1/1/2011	5/1/2011	5/1/2011	1/1/2021	7/1/2021	1/1/2021
Kansas	6/1/2013	12/1/2013	6/1/2013	—	—	—
Kentucky	1/1/2012	7/1/2012	1/1/2012	—	—	—
Louisiana	8/1/2012	1/1/2013	8/15/2012	—	—	—
Maine	11/1/2015	5/1/2016	11/1/2015	—	—	—
Maryland	11/1/2011	5/1/2012	11/1/2011	—	—	—
Massachusetts	7/1/2016	12/31/2016	7/1/2016	—	—	—
Minnesota	6/1/2013	1/1/2014	6/1/2013	—	—	—
Mississippi	9/1/2013	4/10/2014	9/1/2013	—	—	—
Missouri	3/30/2017	9/30/2017	3/30/2017	—	—	—
Montana	1/1/2018	N/A	N/A	—	—	—
Nebraska	7/19/2012	7/19/2012	7/19/2012	—	—	—

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	NAIC Model Effective Date	For Agents Licensed PRIOR to the Effective date	For Agents Licensed AFTER the Effective Date	Revised Model Effective Date	For Agents Licensed PRIOR to the Effective date	For Agents Licensed AFTER the Effective Date
Nevada	—	—	—	—	—	—
New Hampshire	1/1/2015	7/1/2015	1/1/2015	—	—	—
New Jersey	6/6/2011	8/4/2013	8/4/2013	—	—	—
New Mexico	—	—	—	—	—	—
New York	6/30/2011	N/A	N/A	—	—	—
North Carolina	—	—	—	—	—	—
North Dakota	8/1/2011	8/1/2012	8/1/2011	1/1/2022	7/1/2022	1/1/2022
Ohio	7/1/2011	1/1/2012	7/1/2011	—	—	—
Oklahoma	7/14/2010	7/14/2011	7/14/2010	—	—	—
Oregon	7/1/2011	1/1/2012	7/1/2011	—	—	—
Pennsylvania	12/26/2018	Before Agents Next License Period	12/26/2018	—	—	—
Puerto Rico	—	—	—	—	—	—
Rhode Island	6/1/2011	12/1/2011	6/1/2011	4/1/2021	10/1/2021	4/1/2021
South Carolina	9/25/2011	3/25/2012	9/25/2011	—	—	—
South Dakota	7/1/2012	7/1/2013	7/1/2012	—	—	—
Tennessee	11/1/2015	5/1/2016	11/1/2015	—	—	—
Texas	9/1/2011	3/1/2012	9/1/2011	—	—	—
Utah	3/26/2012	N/A	N/A	—	—	—
Vermont	—	—	—	—	—	—
Virginia	4/1/2017	1/1/2018	1/1/2018	—	—	—
Washington	3/29/2012	9/29/2012	3/29/2012	—	—	—
West Virginia	7/1/2011	12/31/2011	7/1/2011	—	—	—
Wisconsin	5/1/2011	11/1/2011	5/1/2011	—	—	—
Wyoming	9/26/2014	3/26/2015	9/26/2014	—	—	—