

From: American Equity Marketing <marketing@email.american-equity.com>

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To: Resource Support

Subject: NEW FOR CONNECTICUT: Suitability updates

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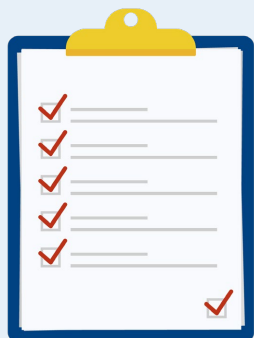


Suitability-NAIC Model #275 Changes

State specific required changes: Connecticut Sales

Effective March 1, 2022, sales in Connecticut will require compliance with new disclosure, documentation and training requirements based on changes to the NAIC's Suitability in Annuity Transaction Model Regulation. If you do business with American Equity in Connecticut, please review this [update](#) about these changes. We will continue to provide you with additional communication and guidance as regulatory requirements change.

Training Requirements



Insurance producers must also complete state training on these new requirements. A newly approved, four-hour NAIC training course has been developed to incorporate these requirements. If you have already taken the previously required four-hour course, you have the option to take this new course or take an additional state approved, one-hour specific course.

This training is provided by third-party continuing education providers. Please refer to the [“State and Federal Training Requirements” Form](#) for training required in the solicitation state and required dates for completion.

This training is due by Aug. 31, 2022.

Form Requirements

[Suitability Acknowledgement Form](#) will be required as of March 1, 2022.

For your convenience, we have additional resources, including videos, available to assist with Suitability information at American Equity. Please visit our website at www.american-equity.com for information and email suitability@american-equity.com with any additional questions. Thank you for your business and support of American Equity.



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