

From: American Equity Marketing <marketing@email.american-equity.com>
Sent: Tuesday, November 2, 2021 12:01 PM
To: Resource Support
Subject: NEW FOR Texas: Suitability updates

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Suitability-NAIC Model #275 Changes

State specific required changes: Texas Sales

Effective Jan. 1, 2022, sales in Texas 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 Texas, 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 Jan 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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