

From: Prudential Annuities <Prudential@em2.email-prudential.com>
Sent: Monday, November 22, 2021 3:51 PM
To: Minnich, Laura
Subject: (NAIC) Suitability in Annuity Transactions Model Regulation 2020

Best Interest Training for Texas [View
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Important Information from Prudential Annuities

NAIC CE Training Update

Texas adopted the NAIC Suitability in Annuity Transaction Model Regulation 2020 (Best Interest), effective 9/1/21.

PLEASE NOTE: Existing annuity product training requirements established thru NAIC 2010 have NOT changed.

Financial Professional Communication Sample:

If you completed the NAIC 2010 annuity training course (CE) prior to 9/1/21 you have until 1/1/22 to complete:

(a) An additional one-time one (1) credit best interest training course approved by the Department of Insurance. (for example Reg Ed Code 491)

-OR-

(b) A revised four (4) credit training course that includes best interest training, approved by the Department of Insurance. (for example RegEd code 490)

IMPORTANT: The one credit best interest course OR revised 4 credit course is a good order requirement for all business submitted on or after 1/1/22.

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If you have NOT completed the NAIC 2010 annuity training course (CE).

You need to complete the revised four (4) credit training course (CE) that includes best interest training, approved by the Department of Insurance. (for example RegEd code 490)

IMPORTANT: This training is a good order requirement for all business submitted on or after 1/1/22.

Please refer to the respective state Department of Insurance website for a list of approved training providers and courses suitable to fulfill the requirement. **If you complete or have completed the BI annuity training course through a vendor other than RegEd, you need to fax your certificate to 800-576-1217, or scan and email to annuity.appointment@prudential.com, so that we can update your status in our records.**

Prudential Annuities continues to monitor the changes in state regulations and will work with you to ensure that we continue to collectively remain compliant with all federal and state laws.



Questions?

Please contact your dedicated Prudential sales team at 800-513-0805, option 1, then option 4.

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