

NAIC Suitability Model Regulation and Revised Model Regulation Requirements

Security Benefit follows the NAIC Suitability in Annuity Transactions Model Regulation, both the version adopted by the NAIC in 2010 (the "Model Regulation") and the version adopted by the NAIC in 2020 (the "Revised Model Regulation").

The Model Regulation requires all Insurance Producers selling or soliciting annuity products to obtain an additional four (4) general continuing education (CE) credits from an APPROVED vendor offering an Annuity Products Course.

The Revised Model Regulation, which implements a best interest standard of conduct, requires an additional 1-hour course for producers who have already taken the original 4-hour course. New producers must take the 4-hour general annuities course.

In addition, the Regulation and Revised Model Regulation require that all Insurance Producers complete product-specific training before soliciting an annuity application.

In response to NAIC Suitability Model Regulation and Revised Model Regulation Requirements, Security Benefit works with RegEd to deliver online product-specific training.

For Fixed Index Annuities, RegEd must be completed regardless of state.

[View Your State Training Requirements](#)

If your state has adopted the Model Regulation, or the Revised Model Regulation, or otherwise requires general annuities training, and you have taken the required training from a company other than RegEd, please send a copy of your certificate from the training provider to:

Security Benefit

P.O. Box 750487

Topeka, KS 66675-0497

Related Resources

- [Suitability and Compliance](#)
- [Advertising Policies and Procedures](#)
- [Anti-Money Laundering Training](#)
- [RegEd](#)