



## Licensing Requirements to Write a Fixed Annuity

### 1. Make sure your AML LIMRA training is complete and that a refresher course has been taken every 2 years

- a. To complete this or check your status, follow this link:

<https://knowledge.limra.com/LimraLogin.aspx>

### 2. Complete your NAIC 4-Hour Annuity Training

- a. Failure to do so will require a new application!
- b. MOST states require this training
- c. Can be completed on [www.webce.com](http://www.webce.com)
- d. Some states require training every 2 years (CA, TX)

### 3. Complete your product training

- a. Every annuity carrier requires product training
- b. Some carriers require training on each product
- c. Failure to complete prior to dating an application will require an all new application!
- d. Product training varies by carrier and is often complete through:
  - i. RegEd - <https://secure.reged.com/TrainingPlatform/>
  - ii. QuestCE - <https://www.questce.com/insurance-continuing-education/naic-suitability-training/>
  - iii. Carrier specific NAIC-Pinpoint Global sites (ask for access)

### 4. Complete Carrier Contracting

- a. If all requirements above are complete, you may complete contracting at the same time as your new business application.

Please send all applications to [apps@carylevinson.com](mailto:apps@carylevinson.com)