



NEW IOWA ANNUITY SUITABILITY QUESTIONNAIRE AND PRODUCER TRAINING REQUIREMENTS REMINDER

Just a reminder that the new Annuity Suitability Questionnaire For All Applicants (DM-1174) must be submitted with all annuity applications for business sold on or after January 1, 2011. The old form DM-1081 can only be accepted with applications dated prior to or on December 31, 2010. The old form will no longer be accepted (even if the application date is prior to January 1, 2011) after January 14, 2011.

Effective January 1, 2011, all Iowa annuity producers who sell to Iowa residents must complete two training components (below) prior to soliciting or selling annuity products.

1. One-time, four-credit General Annuity Training course approved by the Iowa Insurance Division and provided by an education provider approved by the insurance division, and
2. Product-Specific Training with any and all annuity carriers for which you will solicit or sell annuity products.

Click the links below to view the corresponding Compliance Bulletins.

[Compliance Bulletin 18-10 Suitability in Annuity Transactions](#)

[Compliance Bulletin 16-10 Annuity Suitability Producer Training Requirements](#)

Log on to [BEACON](#) for Agent Guide to Suitability and NAFA training link.

If you have any questions, please contact the Domestic Marketing Department at 800-760-3434 or by email at mktg@nationalwesternlife.com.

SAT-1277

National Western Life Insurance Company | 850 East Anderson Lane, Austin, TX 78752-1602
Agent Hotline: 800-760-3434 | Fax: 512-339-8350 or Email: mktg@nationalwesternlife.com
www.nationalwesternlife.com