NFI SOLUTIONS
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ANNUITY PRODUCT TRAINING ACCESS AND SUPPORT

Mutual of Omaha

All required training must be completed prior to writing any business with this carrier. Failure to do so could result in business being returned*

Training only applies to producers soliciting Annuity business - No additional training required for Life products.

New business applications must be solicited and dated at least one day after the training requirement has been met.

Carrier Specific Training: Required for all agents regardless of state.

1. Login to: https://producer.mutualofomaha.com/enterprise/myportal
2. In order to access the training, you must have an agent code. An agent code will be generated within a few days of submitting contracting.
3. Once product training is completed, you must submit the Annuity Product Training Certificate and Acknowledgement Form to the carrier.

ANTI-MONEY LAUNDERING TRAINING ALERT

Mutual of Omaha will only accept five vendors for AML training: LIMRA, RegEd, WebCE, Sandi Kruse, or Kaplan. If you have not taken a course through one of these vendors, you will need to do so before they will issue business.

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NAIC Model State Regulatory Training:

Agents in the states shown below must complete a state approved Annuity Suitability Course.

AL, AK, CA, CO, CT, DE, DC, GA, HI, ID, IL, IN, IA, KS, KY, LA, ME, MD, MA, MI, MN, MS, MO, NE, NH, NJ, ND, OH, OK, OR, RI, SC, SD, TN, TX, VA, WA, WV, WI, WY

Note: FL, NY, and UT do not have state training requirements, but still require agents to complete any product specific training with the carrier.

States that previously have mandated the NAIC Annuity Training Requirements:

Alabama	4 hr. state approved CE course and the Company Specific Training	Effective 01/01/17 producers are required to take both training courses prior to solicitation.
Alaska	4 hr. state approved CE course and the Company Specific Training	Effective 10/16/11 producers are required to complete both training courses prior to solicitation.
California	Company Specific Training *Recommend RegEd for training course 444_CA and ongoing 77A or 435_CA.	Effective 01/01/2012 producers licensed to sell annuities are required to complete the Company Specific Training found on SPA prior to solicitation. *Life-only agents who solicit individuals for the sale of Annuities must complete an initial eight-hour specifically designated Annuity training course prior to soliciting individual consumers; thereafter, complete a four-hour specifically designated Annuity training course every two-year license term.
Colorado	4 hr. state approved CE course and the Company Specific Training	Effective 04/1/11 producers are required to complete both training courses prior to solicitation.

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Delaware	4 hr. state approved CE course and the Company Specific Training	Effective 06/1/17 producers are required to complete both training courses prior to solicitation. Producers holding a life line of authority before April 1, 2017 and who wish to sell annuity products in Delaware must complete training requirement before December 1, 2017. Producers who obtain a life insurance line of on or after June 1, 2017, and who wish to sell annuity products in Delaware must complete the above training requirements prior to solicitation of annuity applications.
District of Columbia	4 hr. state approved CE course and the Company Specific Training	Effective 06/24/11 producers must complete training prior to solicitation.
Florida	Company Specific Training	Effective: 09/30/13 producers must complete training prior to solicitation.
Georgia	4 hr. state approved CE course and the Company Specific Training	Effective 04/01/17 producers are required to take both training courses prior to solicitation.
Hawaii	4 hr. state approved CE course and the Company Specific Training	Effective 01/31/12 producers are required to take both training courses prior to solicitation.
Idaho	4 hr. state approved CE course and the Company Specific Training	Effective 4/4/13: producers are required to complete both training courses prior to solicitation.
Illinois	4 hr. state approved CE course and the Company Specific Training	Effective 07/01/12 producers are required to complete both training courses prior to solicitation.
Indiana	4 hr. state approved CE course and the Company Specific Training	Effective 01/01/12 produces are required to complete both training courses prior to solicitation.
Iowa	4 hr. state approved CE course and the Company Specific Training	Effective 01/1/11 producers are required to complete both training courses prior to solicitation.
Kansas	4 hr. state approved CE course and the Company Specific Training	Effective 6/1/13: producers are required to complete both training courses prior to solicitation.
Kentucky	4 hr. state approved CE course and the Company Specific Training	Effective 01/01/12 producers are required to complete both training courses prior to solicitation.
Louisiana	4 hr. state approved CE course and the Company Specific Training	Effective 08/15/12 producers are required to complete both training courses prior to solicitation.
Maine	4 hr. state approved CE course and the Company Specific Training	Effective 11/01/15 producers are required to complete both training courses prior to solicitation.
Massachusetts	4 hr. state approved CE course and the Company Specific Training	Effective 06/01/17 producers are required to complete both training courses prior to solicitation.
Maryland	4 hr. state approved CE course and the Company Specific Training	Effective 11/01/11 producers are required to complete both training courses prior to solicitation.
Michigan	4 hr. state approved CE course and the Company Specific Training	Effective 06/01/2013 producers are required to complete both training courses prior to solicitation.
Minnesota	4 hr. state approved CE course and the Company Specific Training	Effective 07/01/14 producers are required to complete both training courses prior to solicitation.

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Mississippi	4 hr. state approved CE course and the Company Specific Training	Effective 09/01/14 producers are required to complete both training courses prior to solicitation.
Missouri	4 hr. state approved CE course and the Company Specific Training	Effective 04/01/17 producers are required to complete both training courses prior to solicitation. Producers holding a life line of authority before April 1, 2017 and who wish to sell annuity products in Missouri must complete training requirement before October 1, 2017.
		Producers who obtain a life insurance line of on or after April 1, 2017, and who wish to sell annuity products in Missouri must complete the above training requirements prior to solicitation of annuity applications.
Nebraska	4 hr. state approved CE course and the Company Specific Training	Effective 7/19/12 producers are required to complete both training courses prior to solicitation.
New Hampshire	4 hr. state approved CE course and the Company Specific Training	Effective 1/1/15 producers are required to complete both training courses prior to solicitation.
New Jersey	4 hr. state approved CE course and the Company Specific Training	Effective 08/04/13 producers are required to complete both training courses prior to solicitation.
New York	Company Specific Training	Effective 06/30/11 producers are required to complete the training course prior to solicitation.
North Dakota	4 hr. state approved CE course and the Company Specific Training	Effective 08/01/11 producers are required to complete both training courses prior to solicitation.
Ohio	4 hr. state approved CE course and the Company Specific Training	Effective 07/01/11 producers are required to complete both training courses prior to solicitation.
Oklahoma	4 hr. state approved CE course	Effective 7/14/10 producers are required to complete the training course prior to solicitation.
Oregon	4 hr. state approved CE course and the Company Specific Training	Effective 08/01/11 producers are required to complete both training courses prior to solicitation.
Rhode Island	4 hr. state approved CE course and the Company Specific Training	Effective 06/01/11 producers are required to complete both training courses prior to solicitation.
South Carolina	4 hr. state approved CE course and the Company Specific Training	Effective 09/25/11 producers are required to complete both training courses prior to solicitation.
South Dakota	4 hr. state approved CE course and the Company Specific Training	Effective 07/01/12 producers are required to complete both training courses prior to solicitation.
Tennessee	4 hr. state approved CE course and the Company Specific Training	Effective 11/01/16 producers are required to complete both training courses prior to solicitation.
Texas	4 hr. state approved CE course and the Company Specific Training	Effective 09/01/11 producers are required to complete both training courses prior to solicitation.
Utah	Company Specific Training	Effective 05/25/12 producers are required to complete both training courses prior to solicitation.

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Virginia	4 hr. state approved CE course and the Company Specific Training	Effective 04/01/17 producers are required to complete both training courses prior to solicitation. Producers holding a life line of authority before January 1, 2018 and who wish to sell annuity products in Virginia must complete the above training requirements prior to solicitation of annuity applications.
Washington	Company Specific Training	Effective 03/29/12 producers are required to complete both training courses prior to solicitation.
West Virginia	4 hr. state approved CE course and the Company Specific Training	Effective 07/01/11 producers are required to complete both training courses prior to solicitation.
Wisconsin	4 hr. state approved CE course and the Company Specific Training	Effective 05/1/11 producers are required to complete both training courses prior to solicitation.
Wyoming	4 hr. state approved CE course and the Company Specific Training	Effective 09/26/14 producers are required to complete both training courses prior to solicitation.

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