



Field
Update



September 19, 2011

Annuity Continuing Education Training in Texas Clarified

Producers in Texas must complete eight-hours of annuity-related continuing education training every two years in order to sell annuities going forward.

Aviva [previously communicated](#) that producers wanting to sell annuity contracts in the Lone Star State were required to complete four hours of annuity-related continuing education training annually. Texas, however, has clarified this requirement after the state legislature amended the training requirements in TX HB 2154 to change the requirement to eight hours instead of four over the producer's two-year reporting cycle effective 9/1/2011.

The eight hours of annuity continuing education must be completed prior to a producer's two-year license period expiring in order to continue to sell annuities.

For some producers, their two-year licensing period could be expiring soon. So, to continue to sell annuities, producers must ensure completion of at least eight hours of annuity continuing education over the last two years and approved by the Department of Insurance.

In addition, Texas recently adopted the NAIC Suitability Model, which includes a one-time requirement of a four-hour annuity suitability training course. Please note that the required suitability training can count towards your eight-hour annuity continuing education requirement.

Contact information:

- For general questions about the newly adopted Texas annuity training requirements contact the Texas DOI at 1-800-252-3439 or email PIO@tdi.state.tx.us.
- For specific questions about Texas continuing education requirements email CE@tdi.state.tx.us.
- For questions about using Sircon's online service or questions about continuing education contact Sircon at 517-381-3860.
- For questions about your Aviva Contract, please contact Agency Services @ 800-800-9882, Option 2, Option 6.



Field
Update



March 29, 2010

Texas Annuity Producer Required Training

The Texas Department of Insurance has recently adopted rule 28 TAC 19.1001+ that includes requirements for annuity certification and education. The rule prescribes certain training that annuity producers must complete annually in order to sell annuities. The training is required prior to solicitation.

The training requirements are effective April 1, 2010, however, you are not required to complete the training until the first renewal date of your license. For some of you, this could be quickly approaching, given the April 1, 2010 effective date. To be able to sell annuities on or after the first renewal date of your license, you must complete a four-hour annuity certification course. Annually thereafter, you must complete one four-hour annuity continuing education course. For example: A producer who renews his license on June 1, 2010 needs to complete a four-hour annuity certification course prior to June 1, 2010. The producer will then need to complete a four-hour annuity continuing education course prior to June 1, 2011 and annually thereafter. Completion of the required training prior to your first renewal date will help ensure there is no interruption in your authority to sell annuities.

The Texas DOI (www.tdi.state.tx.us) will be utilizing Sircon (www.sircon.com) as its provider to manage the courses and reporting. You can find approved courses on the Sircon website under the green section of the home page titled "Quick Start for Agents". In that same section, you can select "Continuing Education Transcript Inquiry," input your state, last name and license number to view all courses you have completed.

In order to sell annuities with Aviva, you must complete the required training components prior to your next renewal period. It is important to note that if your agent code allows you to sell both life and annuity products under the same writing number, you will be required to comply with these training requirements even if you do not choose to sell annuity products. If your agent code allows you to sell life products only, you are exempt from this requirement. Aviva will be monitoring the Sircon website to ensure that all agents who can sell annuity products have completed the required training.

Please note: If you have not completed the required training within the time period allowed, we will be unable to accept any new annuity business from you until the training requirements are complete.

Aviva encourages you to become familiar with the Sircon website and ensure that all of your training requirements are completed in advance of your next renewal date to make certain there is no interruption in your ability to sell annuities with us.

Contact information:

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- **For specific questions about Texas continuing education requirements, e-mail:** CE@tdi.state.tx.us
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