

# NAIC Model Regulation 275 State Effective Dates

State	Suitability Review <sup>1</sup>	Product Training <sup>2</sup>	Annuity CE	
			Existing Producers <sup>3</sup>	New Producers <sup>4</sup>
Colorado	April 1, 2011	April 1, 2011	October 1, 2011	April 1, 2011
District of Columbia	June 24, 2011	June 24, 2011	December 24, 2011	June 24, 2011
Hawaii	January 1, 2012	January 1, 2012	January 31, 2012	January 31, 2012
Indiana	N/A	January 31, 2012	July 1, 2012	January 1, 2012
Iowa	January 1, 2011	January 1, 2011	May 1, 2011	January 1, 2011
Maryland	November 1, 2011	November 1, 2011	May 1, 2012	November 1, 2011
New Jersey	December 3, 2011	N/A	N/A	N/A
New York	June 30, 2011	June 30, 2011	N/A	N/A
North Dakota	August 1, 2011	August 1, 2011	August 1, 2012	August 1, 2011
Ohio	July 1, 2011	July 1, 2011	January 1, 2012	July 1, 2011
Oklahoma	N/A	July 14, 2011	July 14, 2011	July 14, 2011
Oregon	July 1, 2011	August 1, 2011	January 1, 2012	August 1, 2011
Rhode Island	June 1, 2011	June 1, 2011	December 1, 2011	June 1, 2011
South Carolina	September 25, 2011	September 25, 2011	March 25, 2012	September 25, 2011
Texas	June 1, 2012	September 1, 2011	March 1, 2012	September 1, 2011
West Virginia	July 1, 2011	July 1, 2011	December 31, 2011	July 1, 2011
Wisconsin	May 1, 2011	May 1, 2011	November 1, 2011	May 1, 2011

1 After this date all annuity business submitted to Insurer must be accompanied by the revised suitability form.

2 After this date a producer must have completed product-specific training before soliciting sales of or making a recommendation for any annuity product.

3 After this date an Existing Producer (a producer who was licensed before the effective date of the rule) must have completed the General Annuity training before soliciting sales of or making a recommendation for any annuity product. Annuity applications submitted with an application sign date after this date will be returned if the Producer has not completed his or her general annuity training course.

4 After this date any New Producer (a producer who becomes life licensed after this date) must complete the General Annuity Training before soliciting sales of or making a recommendation for any annuity product.

For additional state information, visit [www.naic.org/state\\_web\\_map](http://www.naic.org/state_web_map). New states will be added to this list as their effective dates become public. This information has been taken from sources we deemed to be reliable.



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