







# Annuity Carrier Training Requirements

## MUTUAL OF OMAHA/UNITED OF OMAHA

Mutual of Omaha/United of Omaha's online training instructions are provided below. In addition to these carrier product training requirements, please be sure that you are compliant with all state training requirements prior to taking applications in states that require National Association of Insurance Commissioners (NAIC) and/or Best Interest compliance.

In order to view the specific requirements of each state, please go to <https://www.reged.com/annuities-training-platform/> and complete all approved/required courses for your state of sale.

Follow the steps below to ensure compliance with the carrier's training requirements and avoid delays:

-  **Product Training** - Access the necessary training at <https://www.mutualofomaha.com/annuity-brokers/appointments-and-licensing/naic-annuity-suitability-regulation>.
-  Click '**Appointments and Licensing**' in order to access the drop-down menu. In that menu, click the link '**NAIC Annuity Suitability Regulation**' and then '**Take the annuity training course**' to access the necessary training presentation for all of Mutual of Omaha/United of Omaha's annuity products.
-  Once you have completed the training presentation, navigate back to Mutual of Omaha's website (link above) and click on the link '**Certificate and Acknowledgement Form**' to complete the required '**NAIC Suitability in Annuity Transactions Model Regulation Certification and Acknowledgement Form**'.
-  Send the completed '**NAIC Suitability in Annuity Transactions Model Regulation Certification and Acknowledgement**' to Mutual of Omaha via fax to 402.997.1829 or email at [agencymailbox@mutualofomaha.com](mailto:agencymailbox@mutualofomaha.com).

Please contact Mutual of Omaha/United of Omaha at 800.867.6873, if you need assistance with their product training.

Contact CBS Brokerage for more information  763.450.1870