

Annuity Carrier Training Requirements

Mutual Of Omaha

Mutual 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 NAIC compliance. I

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

For More Information Contact CBS Brokerage at 763.450.1870

For Financial Professional Use Only. Not intended for use in solicitation of sales to the public. Not intended to recommend the use of any product or strategy for any client or class of clients. For use with non-registered products only. Products and programs offered through Tellus are not approved for use in all states. Products are subject to the terms and conditions of the annuity and/or insurance contract issued by the carrier. CBS makes no representation regarding the suitability of this concept or the product(s) for an individual nor is CBS providing tax or legal advice. Clients should always consult their own tax, legal, or other professional advisor. 04.22 TELL22-10906-A, 04.23 I-TE.