

CALIFORNIA ANNUITY SUITABILITY & BEST INTEREST TRAINING


ARE YOU LICENSED IN CALIFORNIA AND SELLING ANNUITY CONTRACTS?
(RESIDENTS & NONRESIDENTS)


NO

You **do not** need to take these courses.

YES

You are required to take **BOTH of the new 4-hour and 8-hour Annuity Suitability & Best Interest courses.**

 **4-HOUR**
ANNUITY SUITABILITY
& BEST INTEREST TRAINING

 **8-HOUR**
ANNUITY SUITABILITY
& BEST INTEREST TRAINING

HAVE YOU TAKEN THE NEW 4-HOUR ANNUITY SUITABILITY & **BEST INTEREST** TRAINING?

NO

You must take this new training that includes the best interest standard **before you can renew your license.**

YES

You're on top of it! The next time you'll need to take this training is **before your next renewal.**

WERE YOU LICENSED **BEFORE 12/31/24**

I PLAN TO GET LICENSED **AFTER 12/31/24**

You must take this training after you are licensed, but **before you can sell annuity contracts.**

YES

You must complete this training **by 7/1/25.**

A 4-hour Annuity Suitability & Best Interest training must be repeated every license renewal.

This is a "one and done" requirement. You do not have to take it every license renewal.

BOTH COURSES PENDING APPROVAL FOR CONTINUING EDUCATION CREDIT.



Purchase courses for \$16.95 (4-hour) or \$19.95 (8-hour), or enjoy 365-day access to ExamFX's [CE Library](#) for \$49.95. The library also includes the new required CA Life Insurance Policies 4-Hour Training (value: \$19.95). ExamFX's CE library is a one-stop shop for everything California agents need to renew their insurance licenses.