NWL®

HERE TODAY. HERE TOMORROW.

New Business Checklist

Use the checklist below to ensure required materials have been completed and submitted prior to writing your first business:

- ☐ **Data Sheet & Contracting Paperwork**
- ☐ **Proof of Errors & Omissions (E&O) Coverage — Declaration Page**
  - *Every contract requires E&O*
  - *Named insured must match Contract Name*
- ☐ **Completion of Required Training:**
  - ☐ **AML Training**
    - — Must be current. Visit http://aml.limra.com to access the training.
  - ☐ **Annuity Suitability Training**
    - — See Form SAT-1299 to verify if this training is required by your state.
      - — **Path to access form SAT-1299:** *MyNWL Home Page → Resources → Learning Center → Compliance Information → Annuity Suitability Training State Chart*
    - — *Required prior to sale.*
  - ☐ **Product Specific Training**
    - — See RegEd for details. Visit www.reged.com/annuities-training-platform
    - — Applicable to annuities only.
    - — *Required prior to sale.*

Avoid delays, submit today!

Don't miss a deadline. Submit application materials once they've been completed to avoid delays. Many states only allow back-dating up to 15 days. After the 15-day window, you'll need to get paperwork re-signed.

We look forward to receiving your business!

SAT-1819
(Rev.7.23)