

Carrier	PTE 84-24 Disclosure Needed	Agent File Only, Kept for 6 Years	NB forms reqs	Separate form or attestation on Suitability form	Carrier Agent Contract Amended	DOL Training	Compensation
American Equity	Yes	Yes	Signed #4510 to HO	Separate		Yes	Increase, no more tiered comp
Amerian General	Yes	Yes	Attestation on owner/ acknowledgement form	Financial Professional statement revised	Yes		No changes
Americo	Yes	Yes	Attestation form 17-108-1 5.17	Separate form or attestation			
American National	No	No			Yes		
Annexus/Athene	Carrier Specific	Yes	Suitability worksheet 17341 or Ques. 55444-FL	Suitability form revised 4.17			No changes
Athene	Carrier Specific	Yes	Suitability worksheet 17341 or Ques. 55444-FL	Suitability form revised 4.17			
Delaware Life	Yes	Yes	NBR 0027	Separate Agent Cert Form			
Equitrust	Yes	Yes	ET-DOL-FIDCert 5.17	Separate			No changes
F&G	Yes	Yes	Admin 5736 6.17	Separate Agent Fiduciary Rule Acknowledgement	updated Market conduct Guide		
Global Forethought	Yes	Yes	FAS181-04	Revised Suitability form		Yes and LIMRA	
Great American	Yes	Yes	None at this time	none at this time	None at this time	Limra	
Guggenheim	Yes	Yes	Available 9th or 12th	Revised Suitability form			Elim Level AV, intro of add'l trail comp options
Integrity Life	Yes	Yes	CF-20-31031	Separate Producer Cert.			
Lafayette	Yes	Yes	EF-070-1701/Fixed FA5006-13 Fixed Indexed	Separate Producer Cert.			
Legacy-Americo	Yes	Yes	Form 17-1801-1	Separate form or attestation	Yes		
Legacy-F&G	Yes	Yes	Admin 5736 6.17	Separate Agent Fiduciary Rule Acknowledgement	updated Market conduct Guide		
National Life/LSW	Yes	Yes				Online	DOL business will not count towards on incentives
National Western	Yes	Yes	DM-1174 Rev 5.17	Suitability revised 6-17			
Nationwide	Yes	Yes	FAF-0109AO.11	Suitability revised 6-17	Business Practices & Compliance Guide		
North American	Yes	Yes	Deferred Ann-26003Z/Immediate-26004Z	Suitability revised 6-17 (also new alloc/disclosures)			Slight compensation changes up/down
Oxford	Yes	Yes	Att-6-2017	Separate form-attestation	Yes/online	no-suggest Limra	No changes
Reliance Standard	No	No					Introduction of trail likely in July
Sagicor	Yes	Yes	PROIMPCERT	Separate Producer Cert			
Voya	Yes	Yes	available 9th or 12th	Suitability revised			No changes