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**To:** Resource Support  
**Subject:** Important Reg. 187 update



Forward

## New York Regulation 187 update for annuities

Effective **August 1, 2019**

**Reminder:** New York has updated Regulation 187, its suitability regulation, to include a best interest standard. The regulation, which became effective today, applies to both new annuity sales transactions and in-force annuity transactions.

### Tasks to complete:

- You are required to take Reg 187 training prior to soliciting business in New York. Please use RegEd code **485\_NY** under the State Suitability Training tab when you log into the RegEd site.

[Take training](#)

**Please note:** Athene will receive automatic notification if training is completed through RegEd with the code above. Please allow a few days for processing. If you have questions or trouble accessing the site, please contact RegEd at 800-334-8322.

- Join us for our webcast on **Thursday, August 8 at 10 a.m. CT** where we will discuss the impact of this significant regulatory change on individual producers.

[Register now](#)

### Reg 187 form changes:

To comply with this new regulatory requirement, we've added two new forms specific to business written in New York. Both forms are available now on [Athene Connect](#) and should be used immediately.

- Suitability form (21738, Ver. 08/19)
- Product Comparison Worksheet (PCW) (21882, Ver. 08/19).

Applications with outdated or missing forms will be considered “not in good order.”

**Be sure to use up-to-date materials when offering Athene annuities.**

Thank you for your business. This update is brought to you by Athene — where the power of unconventional thinking can help take you to the next level. For product and sales support, please contact the best Sales Desk in the business at **888-ANNUITY (266-8489)**.



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