



Mutual of Omaha Product Training

Follow the steps below to ensure compliance with the carrier's training requirements and avoid delays:

Product Training- Access the necessary training at <https://www.mutualofomaha.com/annuity-brokers/appointments-and-licensing/naic-annuity-suitability-regulation>.

- Click '**Appointments and Licensing**' 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 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.

Please print the completion certificate and send to our Licensing & Contracting Department at licensing@3dadvisorsinc.com or fax to 586.580.8586.