

THE MAGELLAN GROUP

ANNUITY SUITABILITY – BEST INTEREST STANDARD CE COURSE (#134160)

CE COURSE OVERVIEW

Insurance producers holding the Life, Accident and Health Insurance license authority are required to complete a mandatory 4-hour CE course in Annuity Suitability Best Interest Standards. This course complies with Pennsylvania's Continuing Education (PE) requirement that every Pennsylvania life producer must complete even if you are not actively selling annuity products.

The Annuity Suitability – Best Interest Standard CE course will address annuity principles and concepts, annuity uses, Pennsylvania and Federal taxation, Pennsylvania sales practices including replacement, and annuity suitability best interest requirements as mandated by Act 99. Emphasis is placed on understanding annuity uses with a focus on promoting consumer best interests.

The course is presented using a combination of live personal instruction and a PowerPoint presentation via webinar. Attendees will be able to ask questions to further facilitate the learning process. The live webinar format enables attendees the ability to access traditional face-to-face classroom-type instruction at a safe learning distance. Students who attend the entire CE course will be issued a CE certificate based upon attendance. This CE course is approved for 4 CE credits.

COURSE INSTRUCTOR

Dr. George E. Krauss, D.Ed., CPCU, CLU, ChFC, ARM is the instructor. Dr. Krauss has authored numerous books on insurance including the Pennsylvania licensing texts *Essentials of Property and Casualty Insurance* and *Essentials of Life Accident and Health Insurance*; annotated analyses of the *Homeowners Policy*, the *Personal Auto Policy*, and the *Dwelling Policy* published by the Rough Notes Company; and the *Businessowners Policy Guide* and the *Commercial Property Coverage Guide* published by the National Underwriter Company.

REGISTRATION FEE

The course fee is \$49. Attendees will be e-mailed the PowerPoint presentation used in the CE course. Tape or digital recording of the course is prohibited. Class may be cancelled if attendance is insufficient.

Register by returning this form with full payment (class size is limited so register early)

Annuity Suitability Course - \$49 (1:00 pm to 5:00 pm on October 19, 2022)

Location: Your Computer

Name _____

Company _____

Address _____

City _____ State _____ Zip _____ Tel _____

VISA/MC # _____ Exp. Date _____

Signature _____

E-Mail _____

Fax, mail, or email the registration form and credit card information or mail your check to:

THE MAGELLAN GROUP, INC.
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