

Updated Suitability Forms

To better align our suitability forms with NAIC model regulation, we're updating the forms listed below to gather annual income and expenses vs monthly. This update helps ensure that Athene will maintain our strong suitability program for our producers and customers. The updated forms will be available on [Athene Connect](#) tomorrow, **October 14, 2023**, and should be used immediately.

Important processing dates

Applications with an outdated or missing form received after market close (3 p.m. CT) on **November 14, 2023**, will be considered "not in good order." **Be sure to use up-to-date materials when offering Athene annuities.**

Updated forms

States*	Form	Annual vs Monthly: Impacted pages / questions
Most States	Customer Identification and Suitability Confirmation Worksheet Form 17341 (03/23)	Page 1, Question C Page 3, Question M, N
Minnesota	Customer Identification and Suitability Confirmation Worksheet Form 25115 (03/23)	Page 1, Question C Page 3, Question M, N
New York	Suitability and Best Interest Worksheet: Form 21738 (03/23)	Page 1, Question C Page 4, Question N, O

* There are no impacts to the Florida Annuity Suitability Questionnaire ([Form 55444](#)).

Thank you for your business. At Athene, we create opportunities to do more with competitive annuity solutions for accumulation, income, protection and legacy. For insights and proven strategies that can help you outperform, contact the best Sales Desk in the business at [888-ANNUIITY \(266-8489\)](tel:888-ANNUIITY).