



CHIEF FINANCIAL OFFICER
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STATE OF FLORIDA

TO: Florida Continuing Education Providers

FROM: Division of Agent & Agency Services, Bureau of Licensing
Florida Department of Financial Services (“Department”)

SUBJECT: Suitability of Annuity and Life Transactions for Seniors

DATE: January 18, 2012

The purpose of this memorandum is to advise all continuing education providers offering the Senior Suitability (CE9911) course of the 2012 updated outline effective January 18, 2012.

The new outline may be found on our website www.MyFloridaCFO.com/Agents, go to the Education Central portion, and search for it under the information for submitting CE courses in the Provider section.

New course submissions must contain an outline that includes the minimum course requirements, and all supplemental forms and attachments to be considered for approval under the CE9911 course authority.

Providers with courses approved prior to January 18, 2012 will need to begin updating their material effective this date but will not need to re-apply or upload the new material to their applications that have been already approved. Any renewal application thereafter will need to have the new material included.

The Department will allow up to a six-month period to July 18, 2012 for all material on courses approved prior to January 18, 2012 to be updated and delivered during offerings of courses.

For expeditious processing of course submissions, please follow the Department’s outline in its entirety when submitting your course outline.

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