

WESTERN UNITED LIFE

Existing Producer Update Information

If you have been appointed as a producer with Western United Life in the past, you will need to update your records in the Home Office.

1. Provide all of your current contact information; mailing address, phone & fax numbers, and email address.
2. Provide a copy of your current **Texas Insurance License**.
3. Complete the Annuity **Product Specific Training** and provide a copy of each **Certificate of Completion**. The Training Modules are available at www.MrAnnuity.com in the forms and downloads section. (The Certificate of Completion is the last page in the training module.)

~~Note: Starting in 2015, Annuity Product Training is per Company, instead of per product.~~

4. Provide proof that you have completed the **Annuity Certification Training Course (Texas)**.

If you have NOT completed this course, you **must** do so **BEFORE** submitting an Annuity Application. You may complete the course at www.WebCE.com or www.SuccessCE.com.

As of 09/01/2011, 8 hours of annuity specific training must be completed during the agent's 2-year Group 1 licensing period. If you have completed this additional training, please provide proof of completion. If you are exempt from the additional training, please provide a copy of the exemption letter you received from the Texas Department of Insurance.

5. Provide proof that you are current on **Anti-Money Laundering Training**.

You must complete AML Training every 2 years **BEFORE** submitting an Annuity Application. Annual AML Training is available at <https://aml.limra.com>.

If you have not registered on the LIMRA website before, you will enter a "username" which consists of the first 4 letters of your last name (if your last name is less than 4 letters use all letters in your last name) and the last 6 digits of your social security number. Your password consists of your full last name.

Example Name & SSN: John Smith 123-45-6789 – Username: **smit456789** – Password: **smith**

Please fax, mail, or email the above information to:

Agency Administration ♦ Fax: 509-835-3191 ♦ Email: AnnuityServices@wula.com

Call The Fisher Agency if you have any questions.

DANNY FISHER, CLU, CHFC

The Fisher Agency, Inc. ♦ 13140 Coit Road, Suite 102 ♦ Dallas, TX 75240-5797
972-238-1450 ♦ 800-822-1450 ♦ Fax: 972-680-0562 ♦ Danny@MrAnnuity.com
Office Hours: 9:00 – 4:00 Monday thru Thursday & 9:00 – 12:00 on Fridays

Sales & Service Forms are available at: www.MrAnnuity.com