

State of California

Department of Insurance

Producer Licensing Bureau, Education Section

300 Capitol Mall, Suite 1300

Sacramento, CA 95814-4344

(916) 492-3064 or Fax (916) 323-6851

www.insurance.ca.gov

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Continuing Education and Training Requirements for California Long-Term Care, California Partnership, Variable Fixed and Indexed Annuities, and Workers' Compensation

I. California Long-Term Care:

A. For accident and health agents who market Long Term Care (LTC) or life-only agents who market LTC Insurance Riders:

1. Obtaining authority to solicit the sale of Long-Term Care (LTC) Insurance:

- a. Prior to being authorized to solicit individual consumers for the sale of LTC Insurance, each licensee must complete an initial 8-hour specifically designated LTC training course.

2. Maintaining authority to solicit the sale of LTC Insurance:

If licensed after January 1, 1992, complete a specifically designated 8-hour California LTC course annually for the first four years (without duplicating a course during the same license term). If licensed for four years or longer, completion of a specifically designated 8-hour California LTC course during each two year license term is required. This requirement shall be part of, and not in addition to, the California resident licensee's continuing education requirements in California Insurance Code (CIC) Section 1749.3.

3. Licensees exempt from continuing education:

a. Non-resident license holders:

- 1) All non-residents who wish to solicit the sale of LTC Insurance in California must complete an initial 8-hour course specifically designated California LTC training course and thereafter, complete a specifically designated 8-hour LTC course once during each two-year license term.

b. Licensees who are 70 years of age and 30 consecutive years licensed in good standing in California (Section 1749.3 of the California Insurance Code):

- 1) All licensees exempt from continuing education, who wish to solicit the sale of LTC Insurance in California must complete an initial 8-hour specifically designated California LTC training course and thereafter, complete a specifically designated 8-hour LTC course once during each two year license term.

II. California Partnership for Long-Term Care (PR):

A. For accident and health agents or life-only agents who market LTC riders:

1. Obtaining authority to market, sell or solicit individual consumers for the California Partnership product:

- a. Prior to being authorized to market, sell or solicit individual consumers for California Partnership for Long-Term Care, each licensee must complete one specifically designated LTC training course and one specifically designated 8-hour California Partnership for Long-Term Care classroom course.

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2. Maintaining authority to market, sell or solicit individual consumers for the Partnership product:

After meeting the initial California Partnership for Long-Term Care education requirement, completion of 8-hours of classroom training on the Partnership each two-year license period is required.

III. Variable Fixed and Indexed Annuities:

A. For life-only agents:

1. Obtaining authority to solicit individual consumers in order to sell annuities:

Effective January 1, 2005, every life-only agent who sells annuities shall satisfactorily complete an 8-hour specifically designated annuity training course **prior** to soliciting individual consumers in order to sell annuities.

Thereafter, any life-only agent who solicits individual consumers in order to sell annuities must complete a 4-hour specifically designated annuity training course every two years prior to license renewal. This requirement shall be part of, and not in addition to, the continuing education requirements of California Insurance Code Section 1749.3.

IV. Twenty-Four Hour Care Coverage (WC):

A. Required hours for accident and health agents:

1. Prior to being authorized to sell this product (as defined in CIC 1749.02), accident and health agents must complete a specifically designated 4-hour WC course.