

NEW Athene Connect — Now Live!

Have you seen all that's available on the new [Athene Connect](#)? For a smooth transition to the new portal, check out the tutorial videos and other useful tools on the [Connect training site](#).

Don't forget. You must register to access secure information (like your book of business) on the new Athene Connect, even if you previously registered for the old version.

[Register today](#)

Submit post-issue service forms in 3 easy steps

Access and submit post-issue service forms on behalf of your clients directly from our NEW [Athene Connect](#) producer portal. Our new electronic process allows you and your clients to utilize e-signature on these forms. Click below to learn how to take advantage of this helpful tool in 3 easy steps.

[Show me now](#)

Deadlines are near for 2020 IRA contributions

Don't forget! Deadlines for your clients to make IRA contributions for the 2020 tax year are quickly approaching.* Please review these helpful guidelines for important dates, contribution limits and requirements.

* Pursuant to the federal disaster relief declaration, the IRS has extended the IRA contribution deadline to June 15, 2021 for individuals residing in or have a business located in any one of the 254 Texas counties.

[Review 2020 guidelines](#)

New regulatory changes for California business

Effective March 27, 2021

As announced on **March 10, 2021**, we're making several product, material and forms updates for business written in California due to regulatory changes in that state.

To view the changes, please visit [Athene Connect](#). Please read each section carefully as important application deadlines may be included.

[Tell me more](#)

Annuity producers and the new DOL PTE

On December 15, 2020, the Department of Labor (DOL) issued [Prohibited Transaction Exemption 2020-02](#) (PTE 2020-02). While many in the industry anticipated that PTE 2020-02 might be delayed by the Biden Administration, the DOL allowed the exemption to go into effect on **February 16, 2021**.

Click below to learn how this new rule may affect you and your business.

[Be informed](#)

Additional states adopt new Best Interest Suitability Regulation

Delaware, Michigan, Ohio and Rhode Island have adopted the National Association of Insurance Commissioners (NAIC) revisions to the Suitability in Annuity Transactions Model Regulation (#275) as follows:*

- Rhode Island: **Effective April 1, 2021**
- Michigan: **Effective June 29, 2021**
- Delaware: **Effective August 1, 2021**
- Ohio: **Compliance required August 14, 2021****

As adopted, the revisions will impose new requirements on both producers and insurers. As an annuity carrier, we want to make sure you're aware of key aspects of the new regulation. Click below to learn about actions you need to take in order to meet your Best Interest Obligations in these states.

* We will continue to update you as additional states adopt the new regulation and approve training courses. Pending states include: AL, ID, KY, MA, ME, NE, ND, NV, and VA.

** Ohio adopted the regulation with a February 14, 2021 effective date but the revised regulation provides for a six-month period from the effective date (August 14, 2021) to come into compliance.

[Know the rules](#)

Thank you for your business. At Athene, we're committed to help take you to the next level. For product and sales support, please contact the best Sales Desk in the business at 888-ANNUITY (266-8489).



The Bottom Line

A monthly digest of important business updates.



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