COMPLIANCE
Education Platform

Upcoming Changes to LIMRA's Anti-Money Laundering/Compliance Education Platform

Exciting changes ahead!
This is the first of a series of monthly communications regarding exciting changes coming to our Compliance Education Platform (CEP).

The CEP is our one-stop-shop for LIMRA's:

- Anti-Money Laundering program (AML)
- Fiduciary Education for Sales & Service Professionals program (FESSP)
- Recognizing Financial Exploitation (RFE)
- and Annuity Suitability training (AnnuityXP).

The current system used to administer these training courses, for enrollment and certification, has supported the industry needs for over 15 years and has successfully processed in excess of 1.5 million students and 10 million course enrollments. However, like all systems, it is in need of modernization to continue to serve our members well into the future.

We asked, and you told us!
We started by asking participating companies about their needs, and we heard the following:

1. Broader course offerings
2. Streamlined customer service
3. Faster turnaround/response time
4. Improved data integrity and security

What we're doing.
Using this feedback, LIMRA's Product Management and IT teams went to work to modernize our platform to deliver greater value to you. We are excited to report that the planned changes will meet these needs, and more.

To put these enhancements in place, there will be some changes in how your company interacts and exchanges data with LIMRA. Some of the changes will be administrative (e.g, how requests and manual enrollments are submitted), others will be technical (e.g. how submitted data is formatted, and the layout of certification reporting).

What's next?
Watch for monthly communications to address these specific changes.

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To ensure that all impacted stakeholders within your organization are aware of the upcoming changes **please send a list to me, by July 1, of the following contacts (name, department, and email address) in your company**. We will include these stakeholders in our future updates.

	Contact name	Department	Email address
Compliance			
Administration (the area responsible for administering the programs)			
Technical (e.g IT support in submitting data to and receiving data from LIMRA)			

We look forward to serving your compliance education needs during this transition. If you have any questions, please don't hesitate to contact us.