

DOL RESOURCES

Government regulations can be daunting, but as financial professionals we have a duty to observe them.

Please review the resources assembled here to aid your understanding of the recent Department of Labor (DOL) ruling and gain insight on how to best comply with the new legislation.*



For further DOL Regulations questions please email: AdvancedMarkets@aig.com

No password or login required



THE “FIDUCIARY DUTY RULE”

Official [DOL Fiduciary Rule Website](#) for all the latest on:

- ▶ [The Final Rule](#)
- ▶ [Best Interest Contract Exemption \(BIC\)](#)
- ▶ [PTE 84-24](#)
- ▶ [FAQs \(see: “Related Documents”\)](#)
- ▶ [Presidential Memorandum](#)

UNDERSTANDING THE RULE

- ▶ [Video – LIMRA’s DOL Education program**](#)
- ▶ [NAIFA DOL Workshop for Agents & Advisers](#)
- ▶ [DOL Fiduciary Rule: What it means for NAIFA members](#)

APPLYING THE RULE

- ▶ [LIMRA DOL Compliance Checklists and Templates](#)
- ▶ [Tools for Documenting “Best Interest”](#)
- ▶ [Deloitte - DOL Fiduciary Standard – Are you ready for June 9th?](#)

MORE INFO

- ▶ [LIMRA – DOL Microsite](#)
- ▶ [DOL Request for Information \(RFI\)](#)

AIG RESOURCES

- ▶ [Bulletin 16-182: No Life Sales in Qualified Plans](#)
- ▶ [Bulletin 17-085: Compliance with the DOL Rule](#)
- ▶ [DOL “Do’s & Dont’s” Flyer](#)

* You are solely responsible for fulfilling any fiduciary obligations resulting from the Rule and applicable Prohibited Transaction Exemptions (PTEs).
 ** Available for purchase at www.limra.com/fiduciaryed