

# REMINDER: New form required

As previously communicated, the improved Consumer Profile/Suitability form will speed up and simplify submission

## IMPORTANT:

### Pending eBiz, Suitability Pre-Check

- **App started prior to Nov. 18 will use the old form for 30 calendar days.** For instance, if the application has **not been locked or submitted by Dec. 18**, the new form will go active, previous entries will not carry over, and data re-entry is required.
- **Re-entry tips:** If edits are likely, print the old form or take screenshots of your entries.

### What changes on the form?

- **Streamlined layout:** Cleaner, more intuitive design for faster completion.
- **Updated financial data:** Household liabilities breakout, simpler liquid asset inputs, clearer examples.
- **Smarter questions:** Clearer wording and simplified response options; fewer open-text fields.

▶ [Watch comparison video](#)

#### Get the updated forms now:

- Most states: [Consumer Profile form](#)
- CA, MN: [Consumer Profile form](#) *(No longer includes an addendum)*
- MA: [Consumer Profile addendum](#) *(For use with Consumer Profile form)*

#### Get helpful resources here:

- [Suitability pre-check flyer](#)
- [Agent suitability guide](#)
- CA, MN: [Agent suitability guide](#)