

Draft date: 10/27/25

Virtual Meeting

ANNUITY SUITABILITY (A) WORKING GROUP

Wednesday, Nov. 5, 2025

12:00 – 1:00 p.m. ET / 11:00 a.m. – 12:00 p.m. CT / 10:00 – 11:00 a.m. MT / 9:00 – 10:00 a.m. PT

ROLL CALL

Doug Ommen, Chair	Iowa	Craig Van Aalst	Kansas
Lauren Van Buren, Vice Chair	Wisconsin	Danielle Torres	Michigan
Yada Horace	Alabama	Eric Dunning	Nebraska
Jodi Lerner	California	Keith E. Nyhan	New Hampshire
Jessica Luff	Delaware	Andrew Schallhorn	Oklahoma
Dean L. Cameron	Idaho	Matthew Gendron	Rhode Island

NAIC Staff: Jolie H. Matthews

AGENDA

1. Consider Adoption of Annuity Best Interest Regulatory Guidance and Considerations Document
—*Commissioner Doug Ommen (IA)*
2. Discuss Any Other Matters Brought Before the Working Group—*Commissioner Doug Ommen (IA)*
3. Adjournment