

Draft date: 3/10/26

*Virtual Meeting*

**ANNUITY SUITABILITY (A) WORKING GROUP**

Wednesday, March 11, 2026

1:00 – 2:00 p.m. ET / 12:00 – 1:00 p.m. CT / 11:00 a.m. – 12:00 p.m. MT / 10:00 – 11:00 a.m. PT

**ROLL CALL**

Johanna Nagel, Chair	Iowa	Danielle Torres	Michigan
Lauren Van Buren, Vice Chair	Wisconsin	T. J. Patton	Minnesota
Yada Horace	Alabama	Eric Dunning	Nebraska
Jodi Lerner/Brennain Garber	California	Keith E. Nyhan	New Hampshire
Jessica R. Luff	Delaware	Andy Schallhorn	Oklahoma
Dean L. Cameron	Idaho	Matthew Gendron	Rhode Island
Craig Van Aalst	Kansas		

NAIC Committee Support: Jolie H. Matthews

**AGENDA**

1. Opening Remarks and Introduction—*Johanna Nagel (IA)*
2. Discuss Working Group 2026 Charges and Projects—*Johanna Nagel (IA)*
3. Discuss Planned Resource Document for Observed Industry Compliance Practices with Suitability/Best Interest Standard Supervision Requirements—*Johanna Nagel (IA)*
4. Discuss Any Other Matters Brought Before the Working Group—*Johanna Nagel (IA)*