Date: 5/12/22

Virtual Meeting

ANNUITY SUITABILITY (A) WORKING GROUP
Thursday, May 26, 2022
3:00 – 4:30 p.m. ET / 2:00 – 3:30 p.m. CT / 1:00 – 2:30 p.m. MT / 12:00 – 1:30 p.m. PT

ROLL CALL

Doug Ommen, Chair Iowa Eric Dunning Nebraska
Tate Flott, Vice Chair Kansas Keith Nyhan New Hampshire
Jimmy Gunn Alabama Daniel Bradford Ohio
Jodi Lerner California Andrew Schallhorn Oklahoma
Jessica Luff Delaware Elizabeth Kelleher Dwyer Rhode Island
Dean L. Cameron Idaho Brian Hoffmeister Tennessee
Renee Campbell Michigan Richard Wicka Wisconsin

NAIC Staff: Jolie H. Matthews

AGENDA

1. Discuss Chair Draft of Proposed Frequently Asked Questions (FAQs) on the Safe Harbor/Comparable Standards Provision in the Suitability in Annuity Transactions Model Regulation (#275) —Commissioner Doug Ommen (IA)

2. Discuss Any Other Matters Brought Before the Working Group—Commissioner Doug Ommen (IA)

3. Adjournment