Date: 7/13/22

Virtual Meeting

ANNUITY SUITABILITY (A) WORKING GROUP
Monday, July 25, 2022
3:00 – 4:00 p.m. ET / 2:00 – 3:00 p.m. CT / 1:00 – 2:00 p.m. MT / 12:00 – 1:00 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. Consider Adoption of its May 26 and May 3 Minutes—Commissioner Doug Ommen (IA)

2. Continue Discussion of 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)

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

4. Adjournment