

Draft date: 10/31/24

Virtual Meeting

FINANCIAL ANALYSIS SOLVENCY TOOLS (E) WORKING GROUP

Thursday, November 7, 2024

11:00 a.m. – 12:00 p.m. ET / 10:00 – 11:00 a.m. CT / 9:00 – 10:00 a.m. MT / 8:00 – 9:00 a.m. PT

ROLL CALL

Greg Chew, Chair	Virginia	Lynn Beckner	Maryland
Amy Garcia, Vice Chair	Texas	Judy Weaver/Kristin Hynes	Michigan
Richard Russell/Todrick Burks	Alabama	Debbie Doggett	Missouri
Dave Lathrop/Kurt Regner	Arizona	Olga Dixon	New Jersey
Michelle Lo	California	Victor Agbu	New York
Jack Broccoli	Connecticut	Dwight Radel/Tim Biler	Ohio
N. Kevin Brown	District of Columbia	Ryan Keeling	Oregon
Carolyn Morgan/Nicole Crockett	Florida	Liz Ammerman/Ted Hurley	Rhode Island
Amanda Denton	Indiana	Kristin Forsberg	Wisconsin

NAIC Support Staff: Rodney Good/Bill Rivers/Ralph Villegas

AGENDA

1. Consider Adoption of Sept. 26, 2024 Meeting Minutes—*Greg Chew (VA)* Attachment 1
2. Discuss Comments on the Exposed Financial Analysis Handbook (Handbook) Guidance and Consider Adoption of Revised Guidance—*Greg Chew (VA)*
 - A. Comment Letter from the American Council of Life Insurers (ACLI) Attachment 2
 - B. Handbook Guidance on Surplus Notes Attachment 3
 - C. Handbook Guidance on Recovery and Resolution Planning Attachment 4
3. Consider Adoption of Handbook Guidance—*Greg Chew (VA)*
 - A. Capital Maintenance Agreements Attachment 5
 - B. Insurers in Run-Off Referred by the Risk-Focused Surveillance (E) Working Group Attachment 6
 - C. Combined Guidance and Repositories for Legal, Liquidity, Market, Operational, Pricing and Underwriting, Reputational, Reserving and Strategic Risk Categories Attachment 7
4. Discuss Any Other Matters Brought Before the Working Group
—*Greg Chew (VA)*
5. Adjournment