



ANNUITY SUITABILITY AND BEST INTEREST: DEPOSITION TRAINING WORKSHOP

09/28 MONDAY

NAIC Office

DAY 1

7:50 A.M. Check-In, Breakfast, Introduction, and Overview: Large Group

8:20 A.M. Case Analysis & Goal Setting

8:35 A.M. Document Review & Organization

8:50 A.M. Introductory Questions

9:10 A.M. Break

9:20 A.M. Direct Examination of Victim Witness Techniques

12:00 P.M. Lunch Break

1:00 P.M. Direct Examination of Respondent Producer Techniques

3:50 P.M. Examination of Insurer Employee: Large Group

4:20 P.M. Break

4:35 P.M. Post-Deposition Procedures: Large Group

5:00 P.M. Q&A and Wrap-Up

5:15 P.M. Conclude

