

NAIC INSURANCE SUMMIT / 2024

KNOWLEDGE ACTION IMPACT

SYSTEMS FOR ELECTRONIC RATES AND FORMS FILING (SERFF)
MODERNIZED AND INSURANCE COMPACT WORKSHOP

18

Loews Hotel

Wednesday

11:20 AM

Lunch

1:00 PM

Origins of the Compact and Attendee Input on How to Effectively Share the Compact Story with States and Their Consumers

[Karen Schutter \(Compact\)](#)

1:30 PM

Role of the Compacting States Designated Representative/Annual Proxy

[Becky McElduff \(Compact\)](#)

1:45 PM

Governance Training for Compacting State Members and Regulators Conducted by Outside Counsel

[Becky McElduff \(Compact\)](#) and [Outside Counsel](#)

2:15 PM

Break

2:30 PM

Attendee Feedback for the Compact's Adjunct Services Committee on Scope of a Pilot for a Collaborative Review Process

[Karen Schutter \(Compact\)](#)

3:15 PM

Review of Mix and Match Filings and Attendee Input on Tools and Rules to Address Improper Use

[Ed Charbonnier \(Compact\)](#) and [Becky McElduff \(Compact\)](#)

4:00 PM

Attendee Input on Relevant Compact Information in Member Connect

[Karen Schutter \(Compact\)](#) and [Becky McElduff \(Compact\)](#)



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19

Loews Hotel

Thursday

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|-----------------|--|
| 8:00 AM | Breakfast |
| 9:00 AM | Welcome Back |
| 9:15 AM | Getting it Right: How SERFF Modernization Improves Pre-Submission Compliance
Bridget Kieras (NAIC) and Ed Charbonnier (Compact) |
| 10:00 AM | Coffee Break |
| 10:30 AM | Review Best Practices: Tips and Tricks for Effective Review in SERFF Modernization
Bridget Kieras (NAIC) and Ed Charbonnier (Compact) |
| 12:20 PM | Lunch |
| 1:20 PM | Metrics that Matter: Reporting Tools in SERFF Modernization
Bridget Kieras (NAIC) and Ed Charbonnier (Compact) |
| 2:20 PM | Game Changer: How AI Will Change Rate and Form Review
Bridget Kieras (NAIC) and Ed Charbonnier (Compact) |
| 3:00 PM | Wrap-Up |