

2024 Fall National Meeting
Denver, Colorado

ANNUITY SUITABILITY (A) WORKING GROUP

Sunday, November 17, 2024
4:00 – 5:00 p.m.

Meeting Summary Report

The Annuity Suitability (A) Working Group met Nov. 17, 2024. During this meeting, the Working Group:

1. Discussed the chair's draft safe harbor guidance document and the comments received during the public comment period that ended Nov. 8.
2. Discussed its next steps. The Working Group plans to reconvene the small drafting group that developed the initial draft guidance document to review the comments received and revise the draft accordingly. The Working Group anticipates distributing the revised draft guidance document for public comment and holding a future meeting to discuss the comments received.