2020 Summer National Meeting
Virtual Meeting

ANNUITY SUITABILITY (A) WORKING GROUP
Wednesday, July 29, 2020
1:00 – 2:00 p.m. ET / 12:00 – 1:00 p.m. CT / 11:00 a.m. – 12:00 p.m. MT / 10:00 – 11:00 a.m. PT
WebEx

ROLL CALL

Doug Ommen, Chair
Jillian Froment, Vice Chair
Jerry Workman/Steve Ostlund
Jodi Lerner
Fleur McKendell
Dean L. Cameron
Tate Flott
Renee Campbell
Iowa
Ohio
Alabama
California
Delaware
Idaho
Kansas
Michigan
Bruce R. Ramge
Keith Nyhan
Linda A. Lacewell
Andrew Schallhorn
Elizabeth Kelleher Dwyer
Rachel Jade-Rice
Richard Wicka
Nebraska
New Hampshire
New York
Oklahoma
Rhode Island
Tennessee
Wisconsin

NAIC Support Staff: Jolie H. Matthews

AGENDA

1. Consider Adoption of its Dec. 19, 2019, and 2019 Fall National Meeting Minutes
   —Commissioner Doug Ommen (IA)

2. Discuss its Work in 2020 to Develop a Frequently Asked Questions (FAQ) Guidance Document on the Revisions to 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