

Date: 7/7/20

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

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

W:\National Meetings\2020\Summer\Agenda\ASWG.docx