

Revised: 7/17/20

*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 Event**

ROLL CALL

Doug Ommen, Chair	Iowa	Bruce R. Ränge	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 Jade-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. Hear an Update on State Activities to Adopt Revised *Suitability in Annuity Transactions Model Regulation (#275)*—*Commissioner Doug Ommen (IA)*
3. Discuss its Work in 2020 to Develop a Frequently Asked Questions (FAQ) Guidance Document on the Revisions to Model #275—*Commissioner Doug Ommen (IA)*
4. Discuss Any Other Matters Brought Before the Working Group—*Commissioner Doug Ommen (IA)*
5. Adjournment

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