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

Jillian Froment, Vice Chair
Ohio

Jerry Workman/Steve Ostlund
Alabama

Jodi Lerner
California

Fleur McKendell
Delaware

Dean L. Cameron
Idaho

Tate Flott
Kansas

Renee Campbell
Michigan

Bruce R. Ramge
Nebraska

Keith Nyhan
New Hampshire

Linda A. Lacewell
New York

Andrew Schallhorn
Oklahoma

Elizabeth Kelleher Dwyer
Rhode Island

Rachel Jrade-Rice
Tennessee

Richard Wicka
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. 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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