

Draft: 11/14/2023

*2023 Fall National Meeting  
Orlando, Florida*

### **Life Insurance and Annuities (A) Committee**

Sunday, December 3, 2023

9:30 – 10:30 a.m.

Hilton Orlando Bonnet Creek—Floridian Ballroom A-I—Level 1

### **ROLL CALL**

Judith L. French, Chair	Ohio	Eric Dunning	Nebraska
Carter Lawrence, Vice Chair	Tennessee	Scott Kipper	Nevada
Mark Fowler	Alabama	Justin Zimmerman	New Jersey
Barbara D. Richardson	Arizona	Adrienne A. Harris	New York
Karima M. Woods	District of Columbia	Glen Mulready	Oklahoma
Doug Ommen	Iowa	Scott A. White	Virginia
Vicki Schmidt	Kansas	Nathan Houdek	Wisconsin
James J. Donelon	Louisiana		

NAIC Support Staff: Jennifer R. Cook/Jolie H. Matthews

### **AGENDA**

1. Consider Adoption of its Nov. 21 Minutes Attachment One  
—*Director Judith L. French (OH)*
2. Consider Adoption of the Report of the Life Actuarial (A) Task Force
3. Hear a Federal Update on the Proposed Retirement Security Rule: Definition of an Investment Advice Fiduciary—Taylor Walker (NAIC)
  - A. Hear Brief Comments from Interested Parties
4. Hear a Presentation on Consumer Financial Literacy vs. Life Insurance and Annuities Illustrations Attachment Two  
—*Birny Birnbaum (Center for Economic Justice—CEJ) and Brenda J. Cude (University of Georgia)*
5. Discuss Any Other Matters Brought Before the Committee  
—*Director Judith L. French (OH)*