



Draft date: 11/21/25

OPEN MEETING

*2025 Fall National Meeting
Hollywood, Florida*

NAIC CLE: Risk Retention Groups, Annuities, and Other Topics

Sunday, December 7, 2025

12:30p.m. – 4:05 p.m. EST

Diplomat Convention Center–Grand Ballroom East–Level 2

AGENDA

12:30p.m.–12:35p.m.: Welcome and Opening Remarks–*Olivea Myers (NAIC)*

12:35p.m.–1:45p.m.: Risk Retention Groups in Practice: Insights from Regulators and Industry–*Dan Schelp (NAIC), Sandy Bigglestone (Vermont Department of Financial Regulation), Christine Brown (Vermont Department of Financial Regulation), Joe Deems (National Risk Retention Association), and Gerald Yoshida (Goodsill Anderson Quinn & Stifel)*

1:45p.m.–2:00p.m.: Break

2:00p.m.–3:00p.m.: The Ins and Outs of Annuity Products–*Karen Schutter (Interstate Insurance Product Regulation Compact) and Dan Bradford (Interstate Insurance Product Regulation Compact)*

3:00p.m.–4:00p.m.: Advancing Organizational Culture with Legal Confidence–*Lloyd Freeman (Buchanan Ingersoll & Rooney PC)*

4:00p.m.–4:05p.m.: Closing Remarks & Announcements–*Olivea Myers (NAIC)*