2020 Spring National Meeting  
Conference Call

SERFF ADVISORY BOARD  
Thursday, March 26, 2020  
12:00 – 1:00 pm. AKT / 1:00 – 2:00 p.m. PT / 2:00 – 3:00 p.m. MT / 3:00 – 4:00 p.m. CT / 4:00 – 5:00 p.m. ET  
Diamond Pass Call – Registration Details

ROLL CALL

Barbara D. Richardson, Chair  Nevada  Birny Birnbaum  Center for Economic Justice (CEJ)  
Lori K. Wing-Heier  Alaska  Rachel Benton  Bright Health  
Allen W. Kerr  Arkansas  Theresa Boyce  Chubb Group  
Vicki Schmidt  Kansas  Andrea Davey  Athene Annuity and Life Company  
Chlora Lindley-Myers  Missouri  Karen Schutter  Interstate Insurance Product  
Mike Causey  North Carolina  Regulation Commission (Compact)

NAIC Support Staff: Joy E. Morrison

AGENDA

1. Review its Dec 7, 2019, Minutes—Commissioner Barbara D. Richardson (NV)  
   Attachment One

2. Receive Reports on System for Electronic Rate and Form Filing (SERFF) Activity  
   —Bridget Kieras (NAIC)  
   Attachment Two

3. Receive an Update on SERFF-Related Strategic Projects  
   a. SERFF Data Hoster Decommission—Joy E. Morrison (NAIC)  
   b. SERFF Billing Project—Joy E. Morrison (NAIC)  
   c. Texas Analysis Fee—Joy E. Morrison (NAIC)  
   d. SERFF Assessment—David Sherwood (Deloitte & Touche LLP)  
   Attachment Three  
   Attachment Four  
   Attachment Five  
   Attachment Six

4. Discuss Any Other Matters Brought Before the SERFF Advisory Board  
   —Commissioner Barbara D. Richardson (NV)

5. Adjournment

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