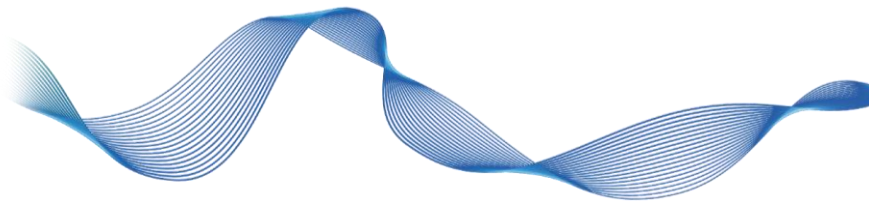




2026 FALL NATIONAL MEETING
DALLAS, TX



Draft date: 10/13/26

*2026 Fall National Meeting
Dallas, Texas*

INVESTED ASSETS (E) TASK FORCE

Monday, November 16, 2026

2:00 – 3:00 p.m.

Convention Center—Grapevine CD—Level 3

ROLL CALL

NAIC Member

Doug Ommen, Chair
Scott A. White, Vice Chair
Peter M. Fuimaono
Ricardo Lara
Joshua Hershman
Michael Yaworsky
Dean L. Cameron
Vicki Schmidt
Angela L. Nelson
Eric Dunning
Susan Ochs
Kaitlin Asrow
Jon Godfread
Judith L. French
Glen Mulready
TK Keen
Michael Humphreys
Elizabeth Kelleher Dwyer
Michael Wise
Carter Lawrence
Amanda Crawford
Patty Kuderer
Nathan Houdek

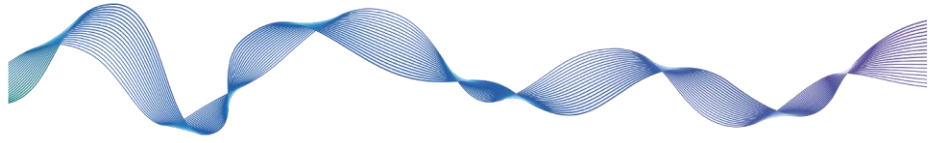
Representative

Carrie Mears
Doug Stolte
Elizabeth Perri
Laura Clements
Ken Cotrone
Anoush Brangaccio
Eric Fletcher
Tish Becker
Danielle Smith
Tadd Wegner
Susan Ochs
Avani Shah/Bob Kasinow
Colton Schulz
Cameron Piatt
Ryan Rowe
Paul Throckmorton
Diana L. Sherman
Liz Ammerman
Ryan Basnett
Trey Hancock
Amy Garcia
Steve Drutz
Amy Malm

State/Territory

Iowa
Virginia
American Samoa
California
Connecticut
Florida
Idaho
Kansas
Missouri
Nebraska
New Jersey
New York
North Dakota
Ohio
Oklahoma
Oregon
Pennsylvania
Rhode Island
South Carolina
Tennessee
Texas
Washington
Wisconsin

NAIC Committee Support: Jim Pinegar/Jennifer Vento/Michele Wong



AGENDA

1. Consider Adoption of its Sept. 1 and Summer National Meeting Minutes—*Carrie Mears (IA)* Attachments One and One-A
Attachment Two
2. Receive a Report from the Investment Analysis (E) Working Group—*Carrie Mears (IA)* Attachment Three
3. Consider Adoption of the Reports of its Working Groups—*Carrie Mears (IA)*
 - A. Investment Designation Analysis (E) Working Group—*Ken Cotrone (CT)* Attachment Four
 - B. Credit Rating Provider (E) Working Group—*Jake Garn (UT)* Attachment Five
4. Consider Adoption of the Credit Rating Provider (E) Working Group's Credit Rating Provider (CRP) Due Diligence Framework—*Carrie Mears (IA)* Attachment Six
5. Hear a Presentation KBRA on Emerging Investment Structures (e.g., Fund Finance) and Evolving Market Trends, Including the Increasing Complexity, Risk, and Interconnectedness of Certain Structured Investments—Bill Cox (KBRA), Ryon Aguirre (KBRA), and Tom Speller (KBRA)
6. Discuss Any Other Matters Brought Before the Task Force—*Carrie Mears (IA)*
7. Adjournment