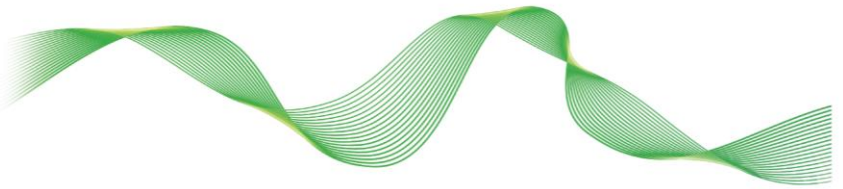




2026 SUMMER NATIONAL MEETING
COLUMBUS, OH



Draft date: 7/20/26

*2026 Summer National Meeting
Columbus, Ohio*

INVESTED ASSETS (E) TASK FORCE

Thursday, August 13, 2026

12:30 – 1:30 p.m.

Hilton Tower 401—Bellows Ballroom A-D—Lower Level

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 Spring National Meeting Minutes
—*Carrie Mears (IA)* Attachment One
2. Consider Adoption of the Reports of its Working Groups—*Carrie Mears (IA)*
 - A. Investment Designation Analysis (E) Working Group—*Ken Cotrone (CT)* Attachment Two
 - B. Credit Rating Provider (E) Working Group—*Jake Garn (UT)* Attachment Three
3. Receive a Report from the Investment Analysis (E) Working Group
—*Carrie Mears (IA)* Attachment Four
Attachment Five
Attachment Six
4. Hear a Presentation on Private Credit and Auditing Fair Value Estimations for Certain Investments (Specifically Assets with a Fair Value Hierarchy of Level 3)—*Dave Osborn (Ernst & Young—EY), Olga Roberts (KPMG), Jim Garner (Forvis Mazars), and Josh Martin (Deloitte)*
5. Discuss Any Other Matters Brought Before the Task Force
—*Carrie Mears (IA)*
6. Adjournment