2024 Spring National Meeting  
Phoenix, Arizona

FINANCIAL CONDITION (E) COMMITTEE  
Monday, March 18, 2024  
8:00 – 9:00 a.m.  
Phoenix Convention Center—301 B-D West—Level 3

ROLL CALL

Nathan Houdek, Chair  Wisconsin  Mike Chaney  Mississippi  
Michael Wise, Co-Vice Chair  South Carolina  Chlora Lindley-Myers  Missouri  
Cassie Brown, Co-Vice Chair  Texas  Justin Zimmerman  New Jersey  
Michael Conway  Colorado  Adrienne A. Harris  New York  
Amy L. Beard  Indiana  Judith L. French  Ohio  
Doug Ommen  Iowa  Elizabeth Kelleher Dwyer  Rhode Island  
Vicki Schmidt  Kansas  Scott A. White  Virginia  
Gary D. Anderson  Massachusetts

NAIC Support Staff: Dan Daveline/Julie Gann/Bruce Jenson

AGENDA

1. Consider Adoption of its 2023 Fall National Meeting Minutes  Attachment One  
   —Commissioner Nathan Houdek (WI)

2. Consider Adoption of its Task Force and Working Group Reports  
   —Commissioner Nathan Houdek (WI)  
   A. Accounting Practices and Procedures (E) Task Force  Pending  
   B. Capital Adequacy (E) Task Force  Pending  
   C. Financial Stability (E) Task Force  Pending  
   D. Receivership and Insolvency (E) Task Force  Pending  
   E. Reinsurance (E) Task Force  Pending  
   F. Valuation of Securities (E) Task Force  Pending  
   G. Group Capital Calculation (E) Working Group  Pending  
   H. National Treatment and Coordination (E) Working Group  Pending

3. Receive a Status Report from the Risk-Based Capital Investment Risk and  
   Evaluation (E) Working Group—Philip Barlow (DC)

4. Receive a Status Report from the Valuation of Securities (E) Task Force  
   —Carrie Mears (IA)
   —Dale Bruggeman (OH)

6. Receive a Status Report on the Request to the Executive (EX) Committee
   —Commissioner Nathan Houdek (WI)

7. Receive Oral Comments on the Framework for Regulation of Insurer Investments and Related Documents
   —Commissioner Nathan Houdek (WI)
   A. Carrie Haughawout (American Council of Life Insurers—ACLI)
   B. Mike Consedine (Athene)
   C. Christopher Anderson (Anderson Insights)
   D. Edward Toy (Risk & Regulatory Consulting—RRC)

8. Discuss Any Other Matters Brought Before the Committee
   —Commissioner Nathan Houdek (WI)

9. Adjournment