2024 Spring National Meeting  
Phoenix, Arizona  

RISK-BASED CAPITAL INVESTMENT RISK AND EVALUATION (E) WORKING GROUP  
Sunday, March 17, 2024  
8:00 – 9:00 a.m.  
Phoenix Convention Center—301 A West—Level 3  

ROLL CALL  

Philip Barlow, Chair  
Thomas Reedy, Vice Chair  
Wanchin Chou  
Ray Spudeck/Carolyn Morgan  
Vincent Tsang  
Roy Eft  
Carrie Mears/Kevin Clark  
Fred Andersen  

District of Columbia  
California  
Connecticut  
Florida  
Illinois  
Indiana  
Iowa  
Minnesota  

William Leung/Debbie Doggett  
Lindsay Crawford  
Jennifer Li  
Bob Kasinow/Bill Carmello  
Dale Bruggeman/Tom Botsko  
Rachel Hemphill  
Doug Stolte  
Steve Drutz/Tim Hays  
Amy Malm  

Missouri  
Nebraska  
New Hampshire  
New York  
Ohio  
Texas  
Virginia  
Washington  
Wisconsin  

NAIC Support Staff: Dave Fleming/Julie Gann  

AGENDA  

1. Consider Adoption of its 2023 Fall National Meeting Minutes  
   —Philip Barlow (DC)  
   Attachment A  

2. Receive Updates from the Valuation of Securities (E) Task Force and the  
   Statutory Accounting Principles (E) Working Group—Philip Barlow (DC)  

3. Receive an Update from the American Academy of Actuaries (Academy)  
   —Philip Barlow (DC)  
   Attachment B  

4. Discuss Residual Tranches—Philip Barlow (DC)  
   Attachments C & D  

5. Discuss Next Steps—Philip Barlow (DC)  
   Attachment E  

6. Discuss Any Other Matters Brought Before the Working Group  
   —Philip Barlow (DC)  

7. Adjournment