

Draft date: 8/5/24

2024 Summer National Meeting  
Chicago, Illinois

**RISK-BASED CAPITAL INVESTMENT RISK AND EVALUATION (E) WORKING GROUP**

Wednesday, August 14, 2024

8:00 – 9:00 a.m.

McCormick Place Convention Center—S105—Level 1

**ROLL CALL**

Philip Barlow, Chair	District of Columbia	Tadd Wegner	Nebraska
Thomas Reedy, Vice Chair	California	Jennifer Li	New Hampshire
Wanchin Chou	Connecticut	Bob Kasinow/Bill Carmello	New York
Ray Spudeck/Carolyn Morgan	Florida	Dale Bruggeman/Tom Botsko	Ohio
Vincent Tsang	Illinois	Rachel Hemphill	Texas
Roy Eft	Indiana	Doug Stolte	Virginia
Carrie Mears/Kevin Clark	Iowa	Steve Drutz/Katy Bardsley	Washington
Fred Andersen	Minnesota	Amy Malm	Wisconsin
William Leung/Debbie Doggett	Missouri		

NAIC Support Staff: Dave Fleming/Julie Gann

**AGENDA**

1. Consider Adoption of its June 21, May 22, April 12, and Spring National Meeting Minutes—*Philip Barlow (DC)* Attachments A–D
2. Receive Updates from the Valuation of Securities (E) Task Force and the Statutory Accounting Principles (E) Working Group—*Philip Barlow (DC)*
3. Hear an Update from the American Academy of Actuaries (Academy) —*Philip Barlow (DC)*
4. Discuss Referrals Related to Funds—*Philip Barlow (DC)* Attachments E–G
5. Consider Adoption of its Working Agenda—*Philip Barlow (DC)* Attachment H
6. Discuss its Next Steps—*Philip Barlow (DC)*
7. Discuss Any Other Matters Brought Before the Working Group —*Philip Barlow (DC)*
8. Adjournment