

## NAIC MEETINGS—VENDOR PRESENTATION GUIDELINE

Due to an increase in the number of Vendor presentation requests that are being made to state regulators to demonstrate technology products and services during NAIC sponsored Meetings, NAIC Meeting – Vendor Presentation Guidelines have been established.

### Benefits of the guidelines include:

- Ensure NAIC maintains a competitive and impartial bidding process to all 3rd party vendors.
- Ensure NAIC Committee Meeting agendas remain focused on policy-making discussions of insurance regulation.
- Provide equitable access for all Vendors to NAIC meetings.
- Allow all NAIC Divisions to stay apprised of the vendor offerings being presented to our regulatory committees.

### Vendor Presentation Guidelines Procedure

1. **Vendor Completes Form** – NAIC staff support has the requesting Vendor complete a Vendor Presentation Request form (available at [http://www.naic.org/documents/meetings\\_vendor\\_pres\\_form.pdf](http://www.naic.org/documents/meetings_vendor_pres_form.pdf)). (A “vendor presentation” is defined as any interested party demonstrating a saleable technology product or service to state insurance regulators.) All requests need to be received by the designated NAIC representative fifteen (15) working days prior to the vendor presentation date in order to provide approval.
2. **Vendor Agreements** – Vendor must agree to a) comply with all NAIC procedures and hotel rules and regulations during the presentation, b) pay all related audio/visual/telephony equipment expenses incurred for the presentation, c) acknowledge their presentation does not represent or imply any commitment, sponsorship or binding agreement by the NAIC or state insurance regulatory agency, d) sign a Confidentiality or Conflict of Interest Agreement, (if deemed necessary).
3. **Presentation Approval** – All requests will be reviewed for approval by the NAIC Director of Member Services and the Senior Strategic Initiatives Council.
4. **Notifications** – Upon approval, NAIC staff support will notify the applicable NAIC Group Chair, and confirm presentation time with Vendor.

For additional questions related to NAIC Meeting Vendor Presentation Guidelines, please contact Trish Schoettger, NAIC Director of Member Services, [tschoettger@naic.org](mailto:tschoettger@naic.org). Guidelines and form are available at [http://www.naic.org/documents/meetings\\_vendor\\_pres\\_guidelines.pdf](http://www.naic.org/documents/meetings_vendor_pres_guidelines.pdf)

**NAIC MEETING—VENDOR PRESENTATION REQUEST FORM**

Today's Date: \_\_\_\_\_

Vendor/Company Name:

\_\_\_\_\_

Email: \_\_\_\_\_

Phone:

\_\_\_\_\_

1. NAIC Meeting/Committee Name

\_\_\_\_\_

2. Meeting Date:

\_\_\_\_\_

3. Vendor/Company Profile (i.e., market segment, company background):

\_\_\_\_\_  
\_\_\_\_\_

4. Summary of product or service to be presented and benefit it could provide to State Insurance Regulators:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

5. Summary of presentation purpose/content:

\_\_\_\_\_  
\_\_\_\_\_

6. List previous/current NAIC and State Insurance Department(s) contracts and/or other presentations made to NAIC, NAIC Committee(s) or State Insurance Department(s):

\_\_\_\_\_  
\_\_\_\_\_

7. By signing below, my company agrees to the following:

- We will comply with all NAIC procedures and hotel rules and regulations during the presentation.
- We agree to pay all related audio/visual/telephony equipment expenses incurred for the presentation.
- We agree that the presentation for this NAIC group does not represent or imply any commitment, sponsorship or binding agreement by the NAIC or state insurance regulatory agency.

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Name of Vendor

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Signature of Authorized Representative

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Date

(Completed forms available at <http://meetings.naic.org>, must be sent to Becky Meyer, NAIC, [bmeyer@naic.org](mailto:bmeyer@naic.org), fifteen (15) days prior to the presentation date.)