

Draft date: 3/6/24

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 Attachment Two
 - B. Capital Adequacy (E) Task Force Attachment Three
 - C. Financial Stability (E) Task Force Attachment Four
 - D. Receivership and Insolvency (E) Task Force Attachment Five
 - E. Reinsurance (E) Task Force Attachment Six
 - F. Valuation of Securities (E) Task Force Attachment Seven
 - G. Group Capital Calculation (E) Working Group Attachment Eight
 - H. Risk-Focused Surveillance (E) Working Group Attachment Nine
 - I. National Treatment and Coordination (E) Working Group Attachment Ten
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)*
5. Receive a Status Report from the Statutory Accounting Principles (E) Working Group on the Principles-Based Bond Project
—*Dale Bruggeman (OH)*
6. Receive a Status Report on the Request to the Executive (EX) Committee
—*Commissioner Nathan Houdek (WI)* Attachment Eleven
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)
 - E. Francisco Paez (Met Life)
8. Discuss Any Other Matters Brought Before the Committee
— *Commissioner Nathan Houdek (WI)*
9. Adjournment