Conference Call

CONTINGENT DEFERRED ANNUITY (A) SUBGROUP
Monday, March 9, 2015
1:00 p.m. – 2:00 p.m. CT

ROLL CALL

Tomasz Serbinowski, Chair
Perry Kupferman
Andrew Rarus
Mark Birdsall
Utah
California
Connecticut
Kansas
Felix Schirripa
Mike Boerner/ Jan Graeber/ Chris Herrick
Craig Chupp/ Ern Johnson

AGENDA

1. Adopt Subgroup recommendations for changes to Standard Nonforfeiture—Model #805
2. Adopt Subgroup recommendations for changes to Synthetic GIC—Model #695
3. Discuss Applicability of the AG 43 to the CDAs
   a. Is there any need for clarifying guidance due to different nomenclature?
   b. Is there a need for a different lapse and/or withdrawal assumption in the Standard Scenario?
   c. Is there a need for additional, CDA-specific guidance with respect to some assumptions?
4. Discuss Next Steps in Evaluation of applicability of AG 43 to the CDAs
5. Discuss Plan of Action with Respect to the Remaining Two Charges (Blanks and Regulator Review Checklists)

2. Discuss Any Other Matters Brought Before the Subgroup
3. Adjournment

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