2014 Summer National Meeting
Louisville, KY

CONTINGENT DEFERRED ANNUITY (A) WORKING GROUP
Saturday, August 16, 2014
8:30 – 10:00 a.m.
Kentucky International Convention Center—Room 207/208—Level 2

ROLL CALL

Ted Nickel, Chair Wisconsin Roger A. Sevigny/Keith Nyhan New Hampshire
Robert Chester Connecticut Joseph Torti III/Elizabeth Dwyer Rhode Island
Jim Mumford Iowa Michael Humphreys Tennessee
Jason Lapham Kansas Tomasz Serbinowski Utah
Bruce R. Ramge Nebraska

AGENDA

1. Consider Adoption of its Aug. 5 Minutes—Commissioner Ted Nickel (WI)
2. Hear Presentation from the Center for Economic Justice (CEJ) on Consumer Concerns with CDAs—Birny Birnbaum (CEJ)
5. Discuss Plan for Revising Annuity Disclosure Model Regulation (#245); Suitability in Annuity Transactions Model Regulation (#275); Advertisements of Life Insurance and Annuities Model Regulation (#570); and Life Insurance and Annuities Replacement Model Regulation (#613)—Jennifer Cook (NAIC)
6. Discuss Issue of Nonforfeiture Benefits as They Relate to CDAs—Commissioner Ted Nickel (WI)
7. Discuss Any Other Matters Brought Before the Working Group—Commissioner Ted Nickel (WI)
8. Adjournment