2014 Fall National Meeting  
Washington, District of Columbia  

CONTINGENT DEFERRED ANNUITY (A) WORKING GROUP  
Sunday, November 16, 2014  
8:30 – 10:00 a.m.  
Washington Marriott Wardman Park—Lincoln 2—Exhibition Level  

ROLL CALL  

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

AGENDA  

1. Consider Adoption of its Oct. 31 and Oct. 24 Minutes—Commissioner Ted Nickel (WI)  
2. Review Progress Report of Contingent Deferred Annuity (CDA)-Related Charges—Jennifer Cook (NAIC)  
4. Consider Adoption of Draft Revisions to the 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)—Commissioner Ted Nickel (WI)  
5. Discuss Issue of Nonforfeiture/Cancellation Benefits as They Relate to CDAs—Commissioner Ted Nickel (WI)  
6. Discuss Any Other Matters Brought Before the Working Group—Commissioner Ted Nickel (WI)  
7. Adjournment  

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