2015 Spring National Meeting
Phoenix, Arizona

LIFE INSURANCE AND ANNUITIES (A) COMMITTEE
Sunday, March 29, 2015
2:00 – 3:30 p.m.
Phoenix Convention Center North—Room 129—Street Level

ROLL CALL

Julie Mix McPeak, Chair
Ralph T. Hudgens, Vice Chair
Jim L. Ridling
Dave Jones
Marguerite Salazar
Katharine L. Wade
Kevin M. McCarty
Nick Gerhart
Bruce R. Ramge
Benjamin M. Lawsky
Mary Taylor
Osbert Potter
Ted Nickel

Tennessee
Georgia
Alabama
California
Colorado
Connecticut
Florida
Iowa
Nebraska
New York
Ohio
Virgin Islands
Wisconsin

AGENDA

1. Hear Federal Legislative Update—Brooke Stringer (NAIC)

2. Consider Adoption of its 2014 Fall National Meeting Minutes—Commissioner Julie Mix McPeak (TN)

3. Discuss and Consider Disbanding ERISA Retirement Income (A) Working Group
   —Commissioner Julie Mix McPeak (TN)

4. Discuss 2015 Charge to Review and Revise Life Insurance Buyer’s Guide—Commissioner Julie Mix McPeak (TN)

5. Consider Referral from the Financial Condition (E) Committee on Process Revisions to Actuarial Guideline XXXVIII—
   the Application of the Valuation of Life Insurance Policies Model Regulation (AG 38)
   —Commissioner Julie Mix McPeak (TN)

6. Consider the Life Actuarial (A) Task Force’s Request for Extension of Model Law Development for the Synthetic
   Guaranteed Investment Contracts Model Regulation (#695) and the Actuarial Opinion and Memorandum Regulation
   (#822)—Commissioner Julie Mix McPeak (TN)

7. Consider Adoption of its Working Group and Task Force Reports:
   • Contingent Deferred Annuity (A) Working Group—Commissioner Ted Nickel (WI)
   • Unclaimed Life Insurance Benefits (A) Working Group—Commissioner Julie Mix McPeak (TN)
   • Life Actuarial (A) Task Force—Commissioner David Mattax (TX) and Mike Boerner (TX)

8. Discuss Model Law Review (A) Subgroup Status—Commissioner Julie Mix McPeak (TN)

9. Discuss Any Other Matters Brought Before the Committee—Commissioner Julie Mix McPeak (TN)

10. Adjournment