 Delta: 3/11/15

2015 Spring National Meeting  
Phoenix, Arizona  

LIFE ACTUARIAL (A) TASK FORCE  
Thursday, March 26, 2015  
8:00 a.m. – 4:00 p.m.  
Sheraton Phoenix Downtown—Phoenix Ballroom D/E—3rd Level  

Friday, March 27, 2015  
8:00 – 11:00 a.m.  
Sheraton Phoenix Downtown—Phoenix Ballroom D/E—3rd Level  

ROLL CALL  

<table>
<thead>
<tr>
<th>Member</th>
<th>Representative</th>
<th>State</th>
</tr>
</thead>
<tbody>
<tr>
<td>David Mattax, Chair</td>
<td>Mike Boerner</td>
<td>Texas</td>
</tr>
<tr>
<td>Mary Taylor, Vice Chair</td>
<td>Pete Weber</td>
<td>Ohio</td>
</tr>
<tr>
<td>Jim L. Ridling</td>
<td>Steve Ostlund</td>
<td>Alabama</td>
</tr>
<tr>
<td>Dave Jones</td>
<td>Perry Kupferman</td>
<td>California</td>
</tr>
<tr>
<td>Anne Melissa Dowling</td>
<td>Andrew J. Rarus</td>
<td>Connecticut</td>
</tr>
<tr>
<td>Kevin M. McCarty</td>
<td>Eric Johnson</td>
<td>Florida</td>
</tr>
<tr>
<td>Nick Gerhart</td>
<td>Mike Yanacheak</td>
<td>Iowa</td>
</tr>
<tr>
<td>Mike Rothman</td>
<td>Fred Andersen</td>
<td>Minnesota</td>
</tr>
<tr>
<td>Bruce R. Ramge</td>
<td>Rhonda Ahrens</td>
<td>Nebraska</td>
</tr>
<tr>
<td>Kenneth E. Kobylowski</td>
<td>Felix Schirripa</td>
<td>New Jersey</td>
</tr>
<tr>
<td>Benjamin M. Lawsky</td>
<td>William Carmello</td>
<td>New York</td>
</tr>
<tr>
<td>John D. Doak</td>
<td>Frank Stone</td>
<td>Oklahoma</td>
</tr>
<tr>
<td>Todd E. Kiser</td>
<td>Tomasz Serbinowski</td>
<td>Utah</td>
</tr>
</tbody>
</table>

AGENDA  

THURSDAY, March 26  

8:00–8:10 a.m. Call to Order/Roll Call/Consider Adoption of Minutes—Mike Boerner (TX)  
8:10–9:45 a.m. 1. Hear Mortality Updates: 2014 Valuation Basic Table (VBT), 2017 Commissioners Standard Ordinary (CSO) Mortality Table, Principle-Based Reserving (PBR) Margins—Mary Bahna-Nolan (Society of Actuaries (SOA)/American Academy of Actuaries (Academy) Joint Project Oversight Group)  
9:45–10:00 a.m. 2. Hear Update on 2014 VBT and 2017 CSO Testing—Mary Bahna-Nolan (SOA)  
10:00–10:10 a.m. Break  
10:10–11:40 a.m. 3. Discuss Valuation Manual Amendment Proposals—John Bruins (American Council of Life Insurers—ACLI)  
11:40 a.m.–1:10 p.m. Lunch  
1:10–1:50 p.m. 4. Receive Contingent Deferred Annuity (A) Subgroup Report—Tomasz Serbinowski (UT)  
1:50–2:00 p.m. 5. Receive C-3 Phase II/AG 43 (E/A) Subgroup Report—Pete Weber (OH)  
2:00–2:10 p.m. Break  
2:10–4:00 p.m. 6. Discuss Indexed Universal Life (IUL) Illustrations—Fred Andersen (MN)
FRIDAY, March 27

8:00–8:05 a.m.  Call to Order/Roll Call—Mike Boerner (TX)
8:05–8:20 a.m.  1. Hear Interstate Insurance Product Regulation Commission (IIPRC) Update—Alice Fontaine (IIPRC)
8:20-8:30 a.m.  2. Receive Aggregate Margin (A) Subgroup Report—Mark Birdsall (KS)
8:30–9:00 a.m.  3. Receive VM-22 (A) Subgroup Report—Felix Schirripa (NJ)
9:00-9:10 a.m.  4. Receive Index-Linked Variable Annuity (A) Subgroup Report—Fred Andersen (MN)
9:10-9:20 a.m.  5. Receive Experience Reporting (A) Subgroup Report—Fred Andersen (MN)
9:20-9:30 a.m.  Break
9:30-10:00 a.m. 6. Hear Update on Nonforfeiture Modernization—Tom Berry (Academy Nonforfeiture Modernization Work Group)
10:00–10:40 a.m. 7. Actuarial Guideline XXXIII (AG 33) Edits—Alice Fontaine (Academy)
10:40-10:55 a.m. 8. Hear Update from the Academy Council on Professionalism—(Academy)
10:55-11:00 a.m.  9. Discuss Any Other Matters Brought Before the Task Force—Mike Boerner (TX)
10. Adjournment