

Date: 8/10/16

2016 Summer National Meeting
San Diego, California

LIFE INSURANCE AND ANNUITIES (A) COMMITTEE
Saturday, August 27, 2016
2:00 – 3:30 p.m.
Seaport Ballroom A-B—Second Level—Seaport Tower

ROLL CALL

Nick Gerhart, Chair	Iowa
Bruce R. Ramge, Vice Chair	Nebraska
Jim L. Ridling	Alabama
Dave Jones	California
Stephen C. Taylor	District of Columbia
David Altmaier	Florida
Ralph T. Hudgens	Georgia
Dean L. Cameron	Idaho
Ken Selzer	Kansas
James J. Donelon	Louisiana
Monica J. Lindeen	Montana
Maria T. Vullo	New York
Mary Taylor	Ohio
Elizabeth Kelleher Dwyer	Rhode Island
Julie Mix McPeak	Tennessee

AGENDA

1. Hear a Federal Legislative Update—*Brooke Stringer (NAIC)*
2. Consider Adoption of its July 27 Minutes—*Commissioner Nick Gerhart (IA)*
3. Hear an Update on the Life Insurance Policy Locator Service Project—*Ginny Ewing (NAIC)*
4. Consider Adoption of its Working Group and Task Force Reports:
 - Model Law Review (A) Subgroup—*Michael Kakuk (MT)*
 - Unclaimed Benefits Model Drafting (A) Subgroup—*Lisbeth Landsman-Smith (CA)*
 - Life Insurance Illustration Issues (A) Working Group—*Richard Wicka (WI)*
 - Life Actuarial (A) Task Force—*Commissioner David Mattax (TX) and Mike Boerner (TX)*
5. Discuss Ways to Promote Adoption of and Compliance with the *Suitability in Annuity Transactions Model Act (#275)*—*Commissioner Nick Gerhart (IA)*
6. Consider a Potential New Committee Charge to “Review and Revise as Necessary Section 6. Standards for Annuity Illustrations in the Annuity Disclosure Model Act (#245) to Take Into Account Disclosures Necessary to Inform Consumers in Light of the Innovations in Products Currently in the Marketplace.”
—*Commissioner Nick Gerhart (IA)*
7. Consider a Potential New Committee Charge to “Review and Revise as Necessary the Model Regulation on the Use of Senior-Specific Certifications and Professional Designations in the Sale of Life Insurance and Annuities (#278) and the Producer and Insurer Bulletin and Consumer Alert – Preventing Abusive Practices: The Misuse of Senior Designations and “Free Lunch” Seminars”—*Commissioner Nick Gerhart (IA)*

8. Discuss a Plan for Revising the *Life Insurance Buyer's Guide*—*Commissioner Nick Gerhart (IA)*
9. Discuss Any Other Matters Brought Before the Committee—*Commissioner Nick Gerhart (IA)*
10. Adjournment

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