



# State of Wisconsin / OFFICE OF THE COMMISSIONER OF INSURANCE

*Jim Doyle, Governor*  
*Sean Dilweg, Commissioner*

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## Office of the Commissioner of Insurance Annuity Sales Supervision Advisory Committee

### Agenda September 11, 2007 at 9:30 a.m.

**Meeting location:** State Department of Health and Family Services, 1 West Wilson St, Room 650, Madison, WI 53703

Council Members: Connie O'Connell, Parrett & O'Connell; Roberta Riportella, PhD, University of Wisconsin; Betsy Abramson, Attorney; Martha Kendler, Northwestern Mutual Life; Patricia Struck, Department of Financial Institutions; Carla Strauch, Thrivent Financial for Lutherans; John Wheeler, CLU ChFC, John Patrick Planning Group; Duwayne Mews, FIC, Financial Strategies; Jane Frahm, American Family Insurance; Scott Borchert, NASD; John Hendrick, CWAG; Kathleen Rivera; Senator Roger Breske; Representative Frank Lasee.

OCI Representatives: Commissioner Sean Dilweg, Deputy Commissioner Kimberly Shaul, Guenther Ruch, Fred Nepple, James Harris, Sue Ezalarab, Mike Honeck, Jennifer Stegall, Debbie Hamele, Mary Sue Gilardi, and Mary Reines

- I. Welcome and Opening Remarks:  
Commissioner Sean Dilweg  
Deputy Commissioner Kimberly Shaul
  - II. Questions and Answers:  
Opportunity for committee members to ask the Chair Deputy Commissioner Kimberly Shaul any questions regarding their service on the committee.
  - III. Annuity Suitability Presentation:  
Mike Honeck, Chief of the Health and Life Insurance Section
  - IV. Senior Seminar Clip
- Break for Lunch at 11:30 a.m. (lunch will be provided)
- V. Annuity Suitability Presentation:  
Carla Strauch, Thrivent Financial for Lutherans  
Questions regarding the Thrivent presentation.
  - VI. Other business allowed and discuss future meetings
  - VII. Adjourn meeting