



State of Wisconsin / OFFICE OF THE COMMISSIONER OF INSURANCE

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Office of the Commissioner of Insurance Life Advisory Council

Agenda

Tuesday, May 5, 2009

10:00 a.m. – 12:30 p.m.

125 South Webster Street, Room 227

Madison, WI 53703

- I. Annuity Disclosure Templates**
Carla Strauch, Thrivent

- II. NAIC Update**
 - Statutory Accounting Principles Working Group
Roger Peterson, OCI

 - SEC Rule on Indexed Annuities
Kim Shaul, OCI

 - NAIC Suitability of annuity Sales Working Group
Kim Shaul, OCI

 - NAIC Annuity Disclosure Working Group
Kim Shaul, OCI

- III. OCI Life Settlement Subgroup Update**
Eileen Mallow, OCI

- IV. Senior Designations Working Group**
Eileen Mallow, OCI

- V. Legislative Update**
Jennifer Stegall, OCI

Administrative Rules:

- INS 2.07, relating to replacement of Life Insurance or Annuity Contracts.

- INS 2.81, relating to the use of the 1980 CSO Standard Ordinary Life Valuation Mortality Table in determining the minimum standard of valuation reserves and the minimum standard non-forfeiture values for pre-need funeral life insurance products.

- INS 6, 26 and 28 relating to licensing, prelicensing and continuing education for insurance agents.

VI. Other Business

Steve Stribling, Chair

- Reminder to Group to Review the Wisconsin Buyer's Guide to Annuities for discussion at the August meeting.

VII. Next Meeting

Tuesday, August 4, 2009