



# State of Wisconsin / OFFICE OF THE COMMISSIONER OF INSURANCE

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## Office of the Commissioner of Insurance Life Advisory Council

### Agenda

Tuesday, August 4, 2009

10:00 a.m. – 12:30 p.m.

125 South Webster Street, Room 227

Madison, WI 53703

- I. **Discussion on Administrative Rule Change to Allow Use of the NAIC “Buyers Guide to Fixed Deferred Annuities with Appendix for Equity Indexed Annuities”**  
Mike Honeck, OCI  
Sharon Brosnan, Chair
- II. **Contract Transparency**  
Sean Dilweg, OCI
- III. **NAIC Update**
  - Securities Valuation Office (SVO) Initiatives Working Group Update  
Commissioner Sean Dilweg, OCI
  - NAIC Suitability of Annuity Sales Working Group  
Kim Shaul, OCI
  - NAIC Annuity Disclosure Working Group  
Kim Shaul, OCI
  - Interstate Compact National Standards Working Group  
Mike Honeck, OCI
- IV. **Pension Protection Act of 2006 and Long Term Care/Annuity/Life Combination Products**  
Todd Laszewski, NML
- V. **Charitable Gift Annuities**  
OCI Presentation: OCI Regulation of Charitable Gift Annuities?  
Sarah Haeft, OCI

Foley & Lardner Presentation  
David Reineke, Foley & Lardner

University of Wisconsin Foundation Presentation  
Russ Howes, University of Wisconsin Foundation

**VI. OCI Life Settlement Subgroup Update**

Eileen Mallow, OCI

**VII. Ins 6.90—Proposed Rule Relating to Senior Designations**

Eileen Mallow, OCI

**VIII. Legislative Update**

Jennifer Stegall, OCI

Federal Bills

S. 1177 (Senator Kohl): Confidence in Long-Term Care Insurance Act of 2009

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.

**IX. Other Business**

Sharon Brosnan, Chair

**X. Next Meeting**

Tuesday, November 3, 2009