



# State of Wisconsin / OFFICE OF THE COMMISSIONER OF INSURANCE

*Jim Doyle, Governor*  
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## Office of the Commissioner of Insurance Life Settlement Subgroup

### Agenda

Thursday, February 26, 2009

10:00 a.m. – 12:30 p.m.

125 South Webster Street

Room 227 – The Spencer Kimball Conference Room

Madison, WI 53703

- I. **Overview of Sun Life v. Paulson, 2008 WL 451054 (D.Minn. 2008)**  
Jim Harris, OCI
  
- II. **Review the OCI Viatical Settlement Discussion Draft.**  
Jim Harris, OCI  
Eileen Mallow, Chair
  - STOLI Definition;
  - Viatical Settlement Contract Definition;
  - Disclosures to Viator;
  - Disclosures to Purchaser;
  - Disclosures to Insurer;
  - Exceptions to prohibited practices.
  
- III. **Next Steps**  
Eileen Mallow, Chair
  
- IV. **Next Meeting Date**  
Thursday, March 26, 2009, from 10:00 a.m. to 12:30 p.m.