



State of Wisconsin / OFFICE OF THE COMMISSIONER OF INSURANCE

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Office of the Commissioner of Insurance Life Settlement Subgroup

Agenda

Tuesday, March 31, 2009

10:30 a.m. – 1:00 p.m.

125 South Webster Street

Room 227 – The Spencer Kimball Conference Room

Madison, WI 53703

- I. **Life Insurance Settlement Association Presentation on the Process for Life Settlement Transactions**
Jason Johns, Coventry
- II. **Tax Implications of Life Settlement Transactions**
Harold Blaize, Department of Revenue
- III. **Review Member Modifications to the OCI Viatical Settlement Draft**
Eileen Mallow, Chair
- IV. **Discuss Outstanding Issues from the February 26th Meeting**
Eileen Mallow, Chair
 - Use of the term “life settlement” vs. “viatical settlement.”
 - Timing of disclosures.
- V. **Next Steps**
Eileen Mallow, Chair
- VI. **Next Meeting Date**
April 30, 2009, from 10:00 a.m. until 12:00 p.m.