



# State of Wisconsin / OFFICE OF THE COMMISSIONER OF INSURANCE

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

*Wisconsin.gov*

125 South Webster Street • P.O. Box 7873  
Madison, Wisconsin 53707-7873  
Phone: (608) 266-3585 • Fax: (608) 266-9935  
E-Mail: [ociinformation@wisconsin.gov](mailto:ociinformation@wisconsin.gov)  
Web Address: [oci.wi.gov](http://oci.wi.gov)

## Office of the Commissioner of Insurance Life Settlement Subgroup

### Agenda

Thursday, April 30, 2009

10:00 a.m. – 1:00 p.m.

125 South Webster Street

Room 227 – The Spencer Kimball Conference Room

Madison, WI 53703

- I. Life Insurance Settlements from a Securities Perspective**  
Caleb Callahan, CFP
- II. Life Insurance Settlement Presentation**  
Jay Orlandi, General Counsel of Transamerica Life Solutions Group
- III. Paulson Case Discussion**  
Jim Harris, OCI
- IV. Review OCI Discussion Draft**  
Eileen Mallow, OCI
- V. Review WCLI Suggested Modifications to the OCI Discussion Draft**  
Eileen Mallow, OCI
- VI. Review Draft Submitted by Timber Creek Financial and Coventry**  
Eileen Mallow, OCI
- VII. OCI Update: Work with DOR to Ensure References to Viatical Settlement are Modified**  
Eileen Mallow, OCI
- VIII. Next Steps**  
Eileen Mallow, Chair
- IX. Next Meeting Date**  
May 28, 2009, from 10:00 a.m. until 1:00 p.m.