



State of Wisconsin / OFFICE OF THE COMMISSIONER OF INSURANCE

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Office of the Commissioner of Insurance Senior Designations Working Group

Agenda

Wednesday, January 21, 2009

1:30 p.m. – 3:00 p.m.

125 South Webster Street, Room 227
Madison, WI 53703

- I. **Introductions**
Asst. Deputy Commissioner Eileen Mallow, Chair
- II. **OCI Bulletin: Improper Use of Certain Designations/Titles Targeting Senior Purchasers**
Asst. Deputy Commissioner Eileen Mallow, Chair
- III. **NAIC Model Regulation on the Use of Senior-Specific Certifications and Professional Designations in the Sale of Life Insurance and Annuities**

Background
Asst. Deputy Commissioner Eileen Mallow, OCI

Explanation of the Model
Holly Strop, OCI Legal Staff
- IV. **Working Group Feedback on the NAIC Model and Application to the sale of Health Insurance Products**
Asst. Deputy Commissioner Eileen Mallow, Chair
- V. **Next Steps**
Asst. Deputy Commissioner Eileen Mallow, Chair
- VI. **Future Meeting Dates**
Thursday February 13, 2009
Thursday March 19, 2009
Thursday April 16, 2009