Group Annuity Uniform Standards

- **Single Premium Group Fixed Annuity Contract Uniform Standards** (Status: Recommended to MC on June call / public hearing at 8/2 in-person meeting / written comment due 8/23 / expect to consider for adoption at 9/30 Commission call)

- **Group Annuity Certificate Uniform Standards** (Status: Recommend at 8/2 in-person Commission meeting / public hearing on 9/30 Commission call)

- **Uniform Standard for Group Guaranteed Interest Contracts for Non-Variable Annuities** (Status: Under consideration by PSC with initial public call on 7/23)

- **Group Policyholder Application Uniform Standards** amendments. (Status: Initial draft of amendments to include group annuity products posted 7/23 for a future public call)

Priority List for New or Amended Individual Life Uniform Standards

- **Additional Standards for Overloan Protection Benefit** (Item 4) - amend to include whole life in scope (Status: Recommended to MC on 2/25 / written comments due 5/13 / public hearing at 6/17 Commission conference call / expect to consider for adoption at 8/2 in-person meeting)

- **Additional Standards for Waiver of Premium Benefits and Waiver of Monthly Deduction Benefits** Items 1 & 2. (Status: Under consideration by PSC with initial public call on 7/23)

- **New Standard for Waiver of Surrender Charges Benefit Feature for Life Insurance Policies** Item 3. (Target: PSC to start consideration in Fall)

- **New Standard for Guaranteed Living Benefits for Variable & Non-Variable Adjustable Life Insurance Policies** Item 6. (Target: PSC to start consideration in Fall)

- **New or Amended Index-Linked Annuity Standards** to allow non-unitized accounts, guaranteed floors, and negative interest crediting - Items 1, 2 and .3 and item 3 on Life list. (Status: Under consideration by Actuarial Working Group. PSC discussion and public calls expected in Fall)

Continued -- Priority List for New or Amended Individual Life Uniform Standards

- **New Standard for Premium Deposit Fund** (Item 9) - (Target: PSC to start consideration in 2020)

- **Provision in life standards re: Policy Providing for Payment of Proceeds in Installment** (Item 5) - amend mandatory lump-sum requirement (Target: PSC to start consideration in 2020)

Priority List for New or Amended Individual Annuity Uniform Standards

- **New or Amend Index-Linked Annuity Standards** to allow non-unitized accounts, guaranteed floors, and negative interest crediting - Items 1, 2 and .3 and item 3 on Life list. (Status: Under consideration by Actuarial Working Group. PSC discussion and public calls expected in Fall)

Return of Premium Uniform Standard for Individual Disability Income Policies

- **New Additional Standard for Return of Premium for Individual Disability Income Insurance** (Status: Recommended to MC on June call / public hearing at 8/2 in-person meeting / written comment due 8/23)