



**AGENDA**  
**Regulator-Only Adjunct Services Committee Call**  
**Thursday, June 12, 2025**  
**1 pm ET / 12 pm CT / 11 am MT / 10 am PT**  
**WebEx**

<b>State</b>	<b>Member</b>	<b>Designated Representative for the Committee</b>
Arizona	Barbara Richardson, Chair	Lori Munn
Pennsylvania	Michael Humphreys, Vice Chair	Shannen Logue
Alaska	Lori Wing-Heier	Sarah Bailey
Arkansas	Alan McClain	Jimmy Harris
Illinois	Ann Gillespie	Jeff Varga
Maryland	Marie Grant	Nour Benchaaboun
Missouri	Angela Nelson	Jo Le Duc
Nebraska	Eric Dunning	Maggie Reinert
Nevada	Scott Kipper	Ned Gains
New Hampshire	D.J. Bettencourt	Victoria Fowler
New Mexico	Alice Kane	
North Dakota	Jon Godfread	John Arnold Chrystal Bartuska
Rhode Island	Elizabeth Kelleher Dwyer	Matt Gendron
South Dakota	Larry Deiter	Jill Kruger Frank Marnell
Vermont	Kaj Samsom	Mary Block
Virginia	Scott White	Mary Ashby Brown
Washington	Patricia E. Kuderer	
West Virginia	Allan McVey	
Wisconsin	Nathan Houdek	Rebecca Rebholz
Wyoming	Jeff Rude	Lela Ladd

**1. Roll Call**

**2. Receive and Discuss Compact Roundtable Feedback Comments on Consultation and Advisory Services Office Framework**

*Explanation: The Committee will review and discuss the feedback from the Compact Roundtable including suggestions for piloting the Framework.*

**3. Consider Proposal for Pilot Program**

*Explanation: The Committee will provide comments and suggested edits to the considerations for piloting the Framework.*

**4. Finalize Consultation and Advisory Services Framework and Pilot Program for Purposes of Soliciting Member and Stakeholder Input at a Public Call in July**

*Explanation: The goal is to finalize this Framework, including the considerations for a pilot, in order to expose and receive public input.*

**5. Update on Life Insurance 101 Training Sessions for entry-level regulators**

*Explanation: The Compact Office will provide an update on this project.*

**6. Any Other Matters and Adjourn**

**MAY 2025 COMPACT ROUNDTABLE**  
**FEEDBACK ON CONSULTATION AND ADVISORY**  
**SERVICES OFFICE FRAMEWORK**

- On May 13<sup>th</sup>, the Compact Officers hosted a Compact Roundtable at the Compact Offices in Washington, DC with more than 50 attendees, including Commissioners, regulators, members of the Legislative Committee, Consumer Advisory Committee, Industry Advisory Committee and filing company representatives.
- Positive feedback on the Framework viewing it as an opportunity to provide services to the states, provide more seasoning for an innovative product, provide an avenue to prioritize and develop Uniform Standards.
- It can provide an opportunity to learn about the products in the market in a quicker way; bringing up innovative features and having discussions moderated by subject matter experts that can benefit all state insurance departments.
- Companies see the value of reaching as many states as possible through this process and would be concerned that it would complement the state filing process and make it more efficient and not create duplicative work or unnecessary delay.
- The attendees thought the process might be useful not only when a company has a new product or benefit feature but when it has associated product forms and actuarial information.
- The attendees viewed the Framework as a valuable opportunity to identify gaps in existing standards and to foster a more unified regulatory approach to the state-by-state product approval.
- The Suggestions for a pilot implementation of the Framework included:
  - Participation by a majority or more of Compacting States
  - Open to companies who are currently registered to use the Compact filing platform
  - Type of filing:
    - Product that Compact has approved but not all Compacting States are participating in because of opting out such as long-term care and disability income
    - Product or benefit feature that would fall outside of the current Uniform Standards but has been identified on the Uniform Standards Development prioritization list