

## **1. Review draft Consultation and Advisory Services Office Framework**

The Committee reviewed the updated framework for the states to leverage the Compact expertise in the Compact-authorized product lines. The updated Framework includes a title change to Consultation and Advisory Services Office. The draft framework provides more background about the origin of committee. The framework description states the compact office will provide services to the states on products under the Compact's authority. The goal is to bring states together to make it more efficient than companies contacting each state individually. States could also ask for assistance. The benefits include helping states by providing expertise at no cost, allowing states to hear the same thing at the same time and to make it easier for companies when filing with member states. It might also lead to the development of a Compact uniform standard. The Compact Office would use the expertise of the existing staff. Director Richardson asked for comments. Maryland comment that the workflow did not include a workflow for states. Mary Block noted that the company needed to advise the states where it wanted to file, so that states could determine if they wanted to participate. Director Richardson suggested a process to let states know about the opportunity to use the expertise of the Compact Office to review a request. The Compact Office will update the draft, and the revised draft will be shared during the Compact Roundtable in May.

## **2. Discuss May 13<sup>th</sup> Compact Roundtable**

Attendees at the Roundtable will provide input on the proposed framework and provide suggestions for conducting a pilot project.

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

The Compact Office is conducting the training with several states in May and will expand it over the summer. Missouri commented that it appreciates this training and will require it for all staff. Karen Schutter said the plan is to incorporate the training program into the NAIC Compass training platform.

## **4. Review the Next Steps / Next Call**

A call will be scheduled after the Roundtable in late May.

## **5. Any Other Matters**