



AGENDA

Regulator-Only Product Standards Committee Call

Tuesday, April 15, 2025

1:30 pm ET / 12:30 pm CT / 11:30 am MT / 10:30 am PT / 9:30 am AKT / 7:30 am HT

State	Member	Designated Representative for the Committee
Iowa	Doug Ommen, Chair	Andria Seip
Vermont	Kaj Samsom, Vice-Chair	Mary Block
Alabama	Mark Fowler	Yada Horace
Alaska	Lori K. Wing-Heier	Sharon Comstock Mae Gabor
Arkansas	Alan McClain	Jimmy Harris
Colorado	Michael Conway	Sydney Sloan
Delaware	Trinidad Navarro	Jessica Luff
Illinois	Ann Gillespie	Jeff Varga
Kentucky	Sharon Clark	Malinda Shepherd
Maryland	Marie Grant	Nour Benchaaboun
Missouri	Angela L. Nelson	Jo LeDuc
New Hampshire	D. J. Bettencourt	Victoria Fowler
New Jersey	Justin Zimmerman	Michael Fahncke
North Carolina	Mike Causey	Ted Hamby
North Dakota	Jon Godfread	Chrystal Bartuska
Ohio	Judith French	Ryan Howell
Pennsylvania	Michael Humphreys	Shannen Logue Lars Thorne
Tennessee	Carter Lawrence	Emily Marsh
Texas	Cassie Brown	Debra Diaz-Lara
Utah	Jonathan Pike	Tanji Northrup Tomasz Serbinowski
Washington	Patty Kuderer	

1. **Roll Call**

2. **Discuss request on the 2025 Prioritization list to expand the list of qualified events in the Additional Standards For Waiver of Surrender Charge Benefit.**

Explanation: Discuss request to expand the qualifying event conditions recognized under the uniform standard to include situations covering at least home displacement and other financial hardship situations and any other conditions or situations that may be beneficial to annuity consumers. Review current provision and discuss the next steps.

3. **Discuss request on the 2025 Prioritization list for a new standard for Additional Standards For Bonus Benefits For Individual Adjustable Life Insurance Policies**

4.

Explanation: Discuss request to develop a standard using the Additional Standards For Bonus Benefits for Individual Deferred Non-Variable Annuities as a starting point.

5. **Discuss preparation for the public call on May 6, 2025**

Explanation: Discuss any questions or comments.

6. **Any Other Matters**

The next meeting will be a public call on May 6, 2025.