



2025 Omaha Roundtable

05 - 06 Nov 2025

Poll results



Table of contents

- What word comes to mind when you think of the Insurance Compact?
- What Uniform Standard is most important to develop?
- Rank in order of most beneficial the reasons to use CASO.
- Rank in order of biggest concern regarding the CASO process.
- What other thoughts do you have about the CASO process?



What word comes to mind when you think of the Insurance Compact?

046





What Uniform Standard is most important to develop?

(1/2)

0 4 6

Paid Family Leave benefit for Disability Income



24 %

Indexed Universal Variable Life Insurance



24 %

Group Long-Term Care Insurance



11 %

More group annuities



4 %

Value-added benefits



35 %



What Uniform Standard is most important to develop?

(2/2)

0 4 6

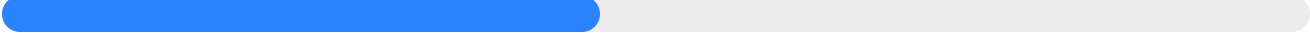
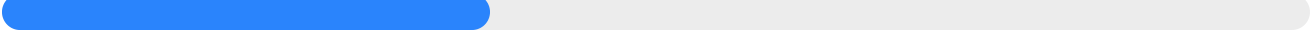
Contingent Deferred Annuities

 2 %



Rank in order of most beneficial the reasons to use CASO.

0 4 6

1. Opportunity to address issues ahead of product filing submission
 3.20
2. Efficiency of one-stop communication with and among states
 3.02
3. Leverage the Compact's product and actuarial expertise
 1.76
4. May lead to development of new Uniform Standards
 1.41



Rank in order of biggest concern regarding the CASO process.

049

1. Participation by enough states to make the process worthwhile
 2.84
2. Timeliness of the process
 2.31
3. Confidentiality of competitive trade secret information
 2.18
4. The ability to reduce review time when the product is filed with the states
 2.04



What other thoughts do you have about the CASO process?

0 2 9

(1/4)

- It is a great idea.
- 3rd party data and privacy requirements (or other requirements) that will be requested in the CASO filing be provided as an FYI to those inquiring about a pre-filing so they can have awareness and prepare accordingly. Especially helpful for startups
- Great potential for significant benefit for states and industry alike
- Need ability for companies to connect with Regulators
- on their findings for the final report. Need to ensure all necessary information has been provided so that findings accurately reflect the company's ask.
- I would prefer a more generic advisory opinion on process addressing issues brought to Compact or a more formal review by compact and then referral of filing to states within SERFF.
- I like the idea. I think companies would use it as long as the confidentiality issue is taken



What other thoughts do you have about the CASO process?

029

(2/4)

care of. I think reducing review time would happen naturally if a company went through the process.

- Communication with states. Set and regular call in calendars.
- Love the idea. Would be helpful to have clear timeline for the process.
- Format of the report and a breakdown by each states' issues versus a comprehensive regulatory issues to consider and take back to legal
- Consider how the Compact

will ID regulators who will participate in CASO reviews

- Would like to explore enhancements to SERFF to allow states to approve product from the CASO filing.
- Like the efficiency and ability to see innovative products.
- Potential for excellent collaboration.
- Really excited about the process
- Ensuring fast pivot to new standards development after CASO learning will be important
- I am concerned that states will



What other thoughts do you have about the CASO process?

(3/4)

- not raise issues during the calls and to do so when the filing is received
- Interested in a set schedule to get ahead of busy calendars. Similar to PSC
- Interested to know how the pilots go
- CASOrific
- It's important to have active participation from the regulators rather than having comments from a couple of states and the others just joining to listen which is a problem we see at the NAIC.
- Document results, successes, failures over time to guide standard and process changes.
- The process looks to be promising for both companies and regulators. Look forward to hearing pilot feedback.
- It really is delicious, regardless of spelling. I hope you get enough states to participate.
- Hopeful it gains traction.
- This has the potential to be really helpful for all parties
- Love this idea - makes me hopeful that we



What other thoughts do you have about the CASO process?

(4/4)

0 2 9

can create great efficiency! Fingers crossed for success

- Coordinating states for a company call/presentation.
- 👍
- Great idea if enough states participate.