

Draft: 11/25/24

Annuity Suitability (A) Working Group  
Denver, Colorado  
November 17, 2024

The Annuity Suitability (A) Working Group of the Life Insurance and Annuities (A) Committee met in Denver, CO, Nov. 17, 2024. The following Working Group members participated: Doug Ommen, Chair (IA); Lauren Van Buren, Vice Chair (WI); Jimmy Gunn (AL); Jodi Lerner (CA); Sally Frechette (DE); Shannon Hohl (ID); Craig VanAalst (KS); Renee Campbell (MI); Maggie Reinert (NE); Keith Nyhan and Michelle Heaton (NH); Daniel Brad2.3 (ihsTJ-0.001 Tc -0.029w 2.8 provide greater clarity as to the distinction between the two provisions. The draft guidance should make clear that the "comparable standard," as defined under 2.3) the draft guidance should make it clear that companies can rely on screening system, as allowed by the draft guidance, to provide flexibility for companies to develop contracts in different circumstances.

Wood noted that the draft guidance appears to be intended to apply to their third-party distributors, but Model # 2.3 Trades suggest

