

Annuity Nonforfeiture Law Revisions and Other Deferred Annuity Current Topics

Session 50 Workshop

- I. Revisions to Annuity Nonforfeiture Law
 - A. State Activity
 - B. Description of the Changes
 - C. Implementation Issues
 - i. Options within the Law
 - ii. Administrative Issues
 - iii. Training
 - D. Marketing Issues
 - E. Product Impact
 - i. Fixed Deferred Annuity
 - ii. Equity-Index Annuity
 - iii. Variable Annuity
- II. Interest Rate Environment
 - A. What Can We Expect?
 - B. Product Impact
- III. Actuarial Guideline 34
 - A. Dollar for Dollar
 - B. Other Issues
- IV. C-3, Phase II
- V. Open Discussion