

RICARDO LARA

CALIFORNIA INSURANCE COMMISSIONER

# Curriculum Board Meeting

Thursday, July 15, 2021   
12:30 p.m. to 3:00 p.m.

Via Microsoft Teams

Join on your computer or mobile app

[Click here to join the meeting](https://teams.microsoft.com/l/meetup-join/19%3ameeting_ODRlMTBmZTUtOWE3Yi00YjI0LTg3ZmMtY2U2YWM4YmFlYjEx%40thread.v2/0?context=%7b%22Tid%22%3a%22da6c0fa7-142e-447a-b3ac-44b771c52917%22%2c%22Oid%22%3a%220656becb-fd42-4777-a9bf-96bc1b013167%22%7d)

Or call in

+1 916-245-2537  
Phone Conference ID: 497 359 220#

RSVP: [Ammy.Dang@insurance.ca.gov](mailto:Ammy.Dang@insurance.ca.gov)

**Instructions to connect to the meeting:**

Registering for this meeting via Microsoft Teams is voluntary, and all persons may attend the meeting regardless of whether a participant registers in advance of the meeting. However, due to an anticipated high volume of participants, it is requested that you join the Microsoft Teams meeting no less than 5 minutes prior to 12:30 p.m. (PDT) via the link provided.

If you are unable to join the Microsoft Teams meeting online or do not wish to voluntarily provide registration information, you may dial-in as a teleconference-only participant using the access code provided; however, you will be unable to see any of the projected materials that are part of the presentation. Requests for meeting presentation materials can be sent to: Ammy.Dang@insurance.ca.gov.

**NOTICE:** Pursuant to Governor Gavin Newsom’s Executive Order N-29-20, in response to the COVID-19 pandemic, the meeting is being held entirely via teleconference. No physical public location is being made available for public participation. Members of the public may observe or participate using the link above. Due to potential technical difficulties, please submit written comments via email by July 9, 2021, to: Ammy.Dang@insurance.ca.gov.

The Curriculum Review Section (CRS) meetings operate under the requirements of the Bagley-Keene Open Meeting Act (Act) set forth in Government Code section 11120-11132. The Act generally requires the CRS to publicly notice meetings, prepare agendas, accept public testimony, and conduct sessions in public unless specifically authorized by the Act to meet in closed session. Agenda items may be taken out of order and action (voting) may be taken on any agenda item.

The CRS conducts public meetings to ensure adequate opportunity for public participation. Time limitation on public comments are at the discretion of the Chair and must relate to agenda items. Materials reviewed during meetings are available for public review and comment on the Curriculum Board webpage at [http://cdicms.insurance.ca.gov/0200industry/Curriculum-Board.cfm**.**](http://cdicms.insurance.ca.gov/0200-industry/Curriculum-Board.cfm)Members of the public may also email: Ammy.Dang@insurance.ca.gov to request a copy of the materials.

Requests for disability-related accommodations or modifications should be made to the CRS at (916) 492-3064, or via email: Ammy.Dang@insurance.ca.govno later than five (5) business days prior to the day of the meeting.

**Curriculum Board Meeting Open Session Agenda Items**

1. Opening Remarks and Introductions – Chairperson Neil Granger
2. Approval of February Meeting Minutes – Chairperson Neil Granger
3. Licensing Update – Charlene Ferguson (CDI)
4. PSI Examination Review – Alon Schwartz (PSI Services)

1. Examination Statistics Update – Jenny Mariona (CDI)
2. Property and Casualty Broker-Agent Subcommittee Update– Stephanie

Bellotti (CDI)

1. Long-Term Care Subcommittee Report – Stephanie Bellotti (CDI)

1. 12-Hour Ethics and California Insurance Code Educational Objectives Update – Benjamin Loi (CDI)

1. Annuity Subcommittee Report – Benjamin Loi (CDI)
2. Curriculum Review Update and Schedule – Holly Kinney (CDI)
3. Education Work Status Report – Ammy Dang (CDI)
4. Roundtable/Adjourn – Everyone

**CALIFORNIA DEPARTMENT OF INSURANCE**

**PROTECT • PREVENT • PRESERVE**

Licensing Services Division

Curriculum and Officer Review Bureau

320 Capitol Mall

Sacramento, California 95814 (916) 492-3064