



RICARDO LARA
CALIFORNIA INSURANCE COMMISSIONER

PUBLIC NOTICE OF MEETING

Curriculum Board Meeting

Thursday, July 21, 2022
12:30 p.m. – 3:00 p.m. (PST)

CDI Sacramento Office

300 Capitol Mall, Sacramento, CA 95814
Meeting in 17th Floor Conference Room (Check-in on 17th Floor)

CDI Oakland Office

1901 Harrison Street, Oakland, CA 94612
Meeting in 6th Floor Conference Room (Check-in with Lobby Security)

CDI Los Angeles Office

300 South Spring Street, South Tower, Los Angeles, CA 90013
Meeting in 9th Floor Conference Room (Check-in on 9th Floor)

To participate online or via telephone, access the Zoom meeting online by using the link below:

[Join Zoom Meeting](#)

Passcode: 629564

Or Telephone:

US: +1 214 765 0479 Toll

USA +1 888 278 0296 US Toll-free

Conference code: 722166

For security and seating purposes, please RSVP if you'll be attending the meeting at any of the CDI Offices to Ammy.Dang@insurance.ca.gov.

Other locations with Board members attending virtually:

102 Persian Drive, Suite 204, Sunnyvale, CA 94089

Note on Public Meetings:

- The Curriculum Board 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 that the Curriculum Board 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 (e.g. voting) may be taken on any agenda item.
- The Curriculum Board conducts public meetings to ensure adequate opportunity for public participation. Time limitation on public comments is 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 [Department of Insurance website](#). 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 Appointments Officer at (916) 492-3612, or via email: Ammy.Dang@insurance.ca.gov no later than five (5) business days prior to the day of the meeting.

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Curriculum Board Members:

Chair

- Neil Granger, Owner, Neil Granger Insurance and Annuity Consulting

Commissioner Appointees

- Samona Caldwell, Government Affairs Coordinator, State Farm Insurance
- Jesse Dogillo, Owner, Bay Area Financial & Insurance Services
- Steve Hinds, Agent, Nationwide Insurance
- Monique Howard, Assistant Vice President, Allied World Insurance Company
- Anne Lintz, Owner/Agent, Anne Lintz Insurance (State Farm Agency)
- Peter Schifrin, President, Schifrin, Gagnon & Dickey, Inc.
- Rene Swan, President and Managing Co-Owner, United Valley Insurance Services, Inc
- Sandra Watts, Roadmap to Recovery Project Coordinator, United Policyholders
- Mimie Yoon-Lee, Executive Director, High Tower Advisors

CDI Staff Members:

- Charlene Ferguson, Chief, Licensing Services Division
- Holly Kinney, Chief, Curriculum and Officer Review Bureau
- Dawn Ward, Manager, Curriculum Review Section
- Katey Piciucco, Attorney, Legal Division
- Maria Alfaro, Analyst, Curriculum Review Section
- Ammy Dang, Analyst, Curriculum Review Section
- Dillion Gingras, Analyst, Curriculum Review Section
- Alyssa Hampton, Analyst, Curriculum Review Section
- Jennifer Mariona, Analyst, Curriculum Review Section

AGENDA

1. Opening Remarks	Neil Granger
2. Approval of February Meeting Minutes	Neil Granger
3. Licensing Update	Charlene Ferguson
4. PSI Examination Review	Alon Schwartz
5. Examination Statistics Update	Jenny Mariona
6. Long-Term Care Subcommittee Report	Dillon Gingras
7. 12-Hour Ethics and California Insurance Code Educational Objectives Update	Ammy Dang
8. Annuity Subcommittee Report	Jenny Mariona
9. Curriculum Review Schedule and Update	Holly Kinney
10. Education Work Status Report	Maria Alfaro
11. Roundtable/Adjourn	Everyone

Materials to review in advance:

- February 17, 2022 Curriculum Board Meeting Minutes

All materials for the Curriculum Board Meeting will be made available on Department of Insurance website on the [Curriculum Board webpage](#).