

DAVID Y. IGE
GOVERNOR



CATHERINE P. AWAKUNI COLÓN
DIRECTOR

DOUGLAS S. CHIN
LIEUTENANT GOVERNOR

GORDON I. ITO
INSURANCE COMMISSIONER

STATE OF HAWAII
INSURANCE DIVISION

DEPARTMENT OF COMMERCE & CONSUMER AFFAIRS
P. O. BOX 3614
HONOLULU, HAWAII 96811-3614
335 MERCHANT ST., ROOM 213
HONOLULU, HAWAII 96813
PHONE NO: (808) 586-2790
FAX NO: (808) 586-2806
cca.hawaii.gov

MINUTES OF THE CONTINUING EDUCATION ADVISORY COMMITTEE MEETING OF
WEDNESDAY, JULY 18, 2018, AT 2:00 PM HELD AT 335 MERCHANT STREET, QUEEN
KAPIOLANI CONFERENCE ROOM, HONOLULU, HAWAII 96813

PRESENT:

Gregory H. Tsuda, Chairperson
Gary L. Lee, Vice Chairperson

Maria Carvalho
Ellen Mimori

James Fujioka
Bernadette Iwane

Terumitsu (Teri) Ikeda

Michael Kinoshita

ABSENT:

Jeffrey J. L. Ling

GUEST:

Martha Im, Staff Attorney

I. CALL MEETING TO ORDER

Meeting called to order at 2:05 PM

II. APPROVAL OF MINUTES OF JUNE 20, 2018

Minutes of June 20, 2018, accepted as submitted. It was moved, seconded and carried that the Minutes of the Meeting be approved and filed.

III. NEW BUSINESS

Legal was called in for the discussion on this matter whether a Course Provider can exclude producers / restrict entry to course(s). After discussion the response was "yes the Course Provider may "close" the course to the public or other producers" as the Hawaii Revised Statutes does not prohibit the course(s) from being closed.

It was also said by committee members that the committee's responsibility is to recommend approval of course(s) based on content.

Committee would like to know why on the Provider Application it asks [BAII] the question "Are the courses open to the public? Yes or No, and not on the course application.

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A. Recommendation of Courses

The Committee recommended approval of one (1) Provider thirteen (13) courses.

Two (2) courses rejected due to Insufficient Insurance Information, and or investments.

A Dollars and Sense Approach: Advisor Alpha – AXA Equitable Life Insurance Company
Productive Aging – Prudential Annuities Life Assurance Corporation

IV. OTHER BUSINESS

Four (4) courses that were pended one for a better course outline showing more reference to insurance and the other three were approved.

One (1) Course pended for a better course outline – Understanding Prescription Drug Trends, One Pill at a Time – Hawaii Assn. of Health Underwriters (HAHU). Received corrected outline sent to the reviewers, course has been approved.

The last three that were pended for clarification on courses being offered to select producers from a select company – “IRA Beneficiary Planning 401: Trust a Beneficiary, Owner RMDs From IRAs (1 Hr.) and Retirement Planning Strategies” – Pacific Life – Retirement Solutions Division, after discussion courses were approved.

V. SCHEDULING OF NEXT MEETING

The next meeting has been scheduled for August 15, 2018

VI. ADJORNMENT

Committee adjourned at 2:40 P.M.

Gregory H. Tsuda, Chairperson