

# 2/9/2026 - Monthly Distributor Advisory Minutes

## Date

Feb 9, 2026

## Participants

<ul style="list-style-type: none"><li>• <b>Morgan Stanley</b> - Carie DeLong, Kennedy Arockiam, George Smoudianis</li><li>• <b>Mass Mutual</b> - Justin Mercieri, Melissa Zils</li><li>• <b>LPL</b> - Michael Fennelly, Shwanda Phillips, Leland Amenhauser</li></ul>	<ul style="list-style-type: none"><li>• <b>FIDx</b> - Colleen Ruane</li><li>• <b>Raymond James</b> - Johanna Rusz, Greg Street</li><li>• <b>RBC</b> - Louis Oswald, Jason Byrnes</li><li>• <b>Wells Fargo</b> - Ben Daniels, John Schmugge</li></ul>	<ul style="list-style-type: none"><li>• <b>Osaic</b> - Andrew Marvel, Scott Griffiths</li><li>• <b>iPipeline</b> - Wendy Crane, Denise Madigosky, Adam Ducorsky, Stuart Feldman</li></ul>
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## Discussion Topics & Notes

### 1. AWS Migration

- a. Reminder - Going to Production: March 20, 2026
- b. Test, Test, Test

### 2. AiPEX

#### a. Round Table Pre-Work

- i. If you plan to attend AiPEX, we are asking you to gather some data within your organization and send to us by mid-February if possible.

#### ii. Why

1. Able to review the data for both distributors and carriers before round tables to help us identify themes and trends in industry NIGO issues, pain points, etc.

- a. Not just NIGOs, but what is causing delays?

2. Help drive valuable discussion points

#### iii. What is the pre-work/info we are requesting? Your organization's:

1. Top NIGO Rates

2. Top NIGO Reasons

3. Top Reasons for Agent Calls

4. Top Pain Points

5. Please include metrics, quantify with numbers and percentages to help us gauge impacts and comparisons within the industry. For example, Org receives 5000 calls a month, the top reasons for agent calls X and makes up 45% of agent calls.

b. Denise will have a session on unique ways to use Universal Mapping

c. Another session on AI with our Forms & Signature Validation

i. Go over what we are looking to do and solve for

ii. Will have some case studies - hands on to gain some feedback

d. Some additional sessions that will be more generic, not product specific.

3. ACORD Meeting - Topic: eDelivery


a. When: March 4th

b. Regarding: eDelivery and best standard practice on modeling in the PPfAs

c. If interested in participating, reach out to ACORD or Denise Madigosky to get added.

## Action items

## Decisions

 Type /decision to add a new decision