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| **FINANCIAL ANALYSIS Solvency Tools (E) WORKING GROUP**  **Financial Analysis Handbook Proposed Revision Form** | **SUBMIT TO** NAIC – KC **By June 1, 2024** |

#### EXAMINATION OVERSIGHT (E) TASK FORCE

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| INSTRUCTIONS | FOR NAIC USE ONLY |
| 1. Complete this form for EACH Handbook proposal. Under "Identification of  Item(s) to be Changed," include section & page number, line or item identifier.  2. All attachments should be presented in a format wherein new language is underscored and deletions struck through.  3. Please consider whether this revision proposal is also addressed elsewhere in the Handbook.  4. CAUTION: before completing this form, please read additional instructions on reverse side of this form. | DISPOSITION  [ ] ADOPTED  [ ] REJECTED  [ ] DEFERRED  [ ] OTHER (SPECIFY)  [ ] |
|  |
| DATE:  NAME:  TITLE:  STATE:  ADDRESS:  TELEPHONE:  CONTACT PERSON : | NOTES |

**HANDBOOK SECTION NAME AND NUMBER TO WHICH PROPOSAL APPLIES**

**If STATEMENT TYPE SPECIFIC, ALSO IDENTIFY THE TYPE:**

[ ] Life/A&H [ ] Property & Casualty [ ] Title [ ] Health

**IDENTIFICATION OF ITEM(S) TO BE CHANGED**

**REASON OR JUSTIFICATION FOR CHANGE \*\***

**(STATE, IN SPECIFIC TERMS, THE BENEFIT TO BE DERIVED FROM THIS PROPOSAL)**

**Additional Instructions and Information**

# The Financial Analysis Solvency Tools (E) Working Group meets via conference call throughout the year to consider proposed changes to the NAIC *Financial Analysis Handbook* (Handbook). Suggestions to the Handbook should be submitted by **June 1, 2024**. Send proposals via email to Ralph Villegas, Life/Health Financial Analysis Manager, [rvillegas@naic.org](mailto:jkoenigsman@naic.org), or fax to 816-460-7563; or send to Rodney Good, Property/Casualty Financial Analysis Manager, [rgood@naic.org](mailto:adaleo@naic.org), or fax to 816-460-0176. Original copies may be sent to:

National Association of Insurance Commissioners

Financial Analysis & Examination Unit

Financial Regulatory Services Department

1100 Walnut Street, Suite 1500

Kansas City, MO 64106-2197

For questions, call the Financial Analysis & Examination Unit at (816) 842-3600.

## Proposed Revisions

* During the Working Group’s review, changes proposed via this form will be considered along with an analysis conducted by the NAIC Financial Analysis & Examination Unit of the effectiveness and usefulness of procedures, ratio limits and language.
* The NAIC Financial Analysis & Examination Unit also studies adopted changes to the Annual Statements and provides revision proposals to the Working Group. The NAIC Financial Analysis & Examination Unit automatically makes changes to the Handbook for minor changes, such as for page and line numbers.
* The Handbooks are automated on i-Site+. The Handbook is intended to be a dynamic tool. The Working Group is interested in feedback on both analytical and software features. Please contact the NAIC Help Desk at (816) 842-3600 before submitting a form. Many enhancements have been proposed which could not be implemented. Also, some proposals may relate to existing features that the Help Desk may be able to explain.