

Draft: 3/10/26

Producer Licensing Uniformity (D) Working Group
Virtual Meeting
February 17, 2026

The Producer Licensing Uniformity (D) Working Group of the Producer Licensing (D) Task Force met Feb. 17, 2026. The following Working Group members participated: Kevin Schlautman, Chair (NE); Jill Huisken, Vice Chair (MI); Kayla Erickson (AK); Charlene Ferguson (CA); Monicka Richmeier (KS); Shelley Taylor-Barnes (MD); Vanessa C. Miller (MS); Susan Daou (ND); Vanessa DeJesus (NM); Lindsey Jones (OH); Courtney Khodabakhsh (OK); Mariel Garcia (RI); Tony Dorschner (SD); Randy Overstreet (UT); Richard Tozer (VA); Nicole Rayl (WA); Melody Esquivel (WI); and Lisa Hastings (WY).

1. Discussed its 2026 Charges and Priorities

Schlautman said the Working Group's 2026 charges are to:

- Work closely with state producer licensing directors and exam vendors to ensure that: 1) the states achieve full compliance with the standards in order to achieve greater uniformity; and 2) the exams test the qualifications for an entry-level position as a producer.
- Provide oversight and ongoing updates to the *State Licensing Handbook*, as needed.
- Monitor and assess the state implementation of the Uniform Licensing Standards (ULS), and update the standards, as needed.
- Review and update the NAIC's uniform producer licensing applications and uniform appointment form, as needed, and provide any recommended updates to the Producer Licensing (D) Task Force by the Summer National Meeting.

Schlautman said that in 2025, the Working Group began reviewing the *State Licensing Handbook*. He said that throughout the year, the Working Group completed the review of Chapter 9—Lines of Insurance, Chapter 10—Surplus Lines Producer Licenses, and Chapter 11—Appointments. He said the Adjuster Licensing (D) Working Group completed the review of Chapter 18—Adjusters, and the Uniform Education (D) Working Group completed the review of Chapter 6—Prelicensing Education, Chapter 8—Testing Programs, and Chapter 14—Continuing Education.

Schlautman said the focus for 2026 is to review the remaining chapters, including Chapter 12—Business Entity, Chapter 13—Temporary Licenses, Chapter 19—Bail Bond Agents, Chapter 24—Managing General Agents, Chapter 25—Multiple Employer Welfare Arrangements, and Chapter 30—Viatical and Life Settlement Brokers. He said there was also discussion about possibly adding a pharmacy benefit manager (PBM) chapter.

Schlautman said other possible topics for the year include the continued efforts to obtain remaining state self-report charts for the ULS and discussions regarding uniformity in the 1033 waiver process.

Schlautman said the Working Group has scheduled conference calls throughout the year that will take place on the third Tuesday of each month. He said the meeting invites have been distributed and can be found on the NAIC public calendar and the Working Group's web page.

Schlautman said the Working Group may need to revisit any tabled items from prior chapters, including just-in-time appointments and surplus lines/resident surplus licenses. He said the Working Group may need to review the remaining chapters not listed last year to confirm the handbook was reviewed as a whole.

Having no further business, the Producer Licensing Uniformity (D) Working Group adjourned.