

**EXAMINATION OVERSIGHT (E) TASK FORCE
FINANCIAL ANALYSIS SOLVENCY TOOLS (E) WORKING GROUP**

<p>SUBMIT TO NAIC – KC By June 1, 2020</p>

Financial Analysis Handbook Proposed Revision Form

<p><u>INSTRUCTIONS</u></p> <ol style="list-style-type: none"> Complete this form for EACH Handbook proposal. Under "Identification of Item(s) to be Changed," include section & page number, line or item identifier. All attachments should be presented in a format wherein new language is underscored and deletions struck through. Please consider whether this revision proposal is also addressed elsewhere in the Handbook. CAUTION: before completing this form, please read additional instructions on reverse side of this form. 	<p>FOR NAIC USE ONLY</p> <p><u>DISPOSITION</u></p> <p>[] ADOPTED [] REJECTED [] DEFERRED [] OTHER (SPECIFY) [] _____</p>
<p>DATE: _____ NAME: _____ TITLE: _____ STATE: _____ ADDRESS: _____ TELEPHONE: _____ CONTACT PERSON : _____</p>	<p><u>NOTES</u></p>

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, 2020**. Send proposals via email to Ralph Villegas, Life/Health Financial Analysis Manager, rvillegas@naic.org, or fax to 816-460-7563; or send to Rodney Good, Property/Casualty Financial Analysis Manager, rgood@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.

**** This section must be completed on all forms.**

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