

**NAIC BLANKS (E) WORKING GROUP**

**Blanks Agenda Item Submission Form**

<b>CONTACT PERSON:</b> _____ <b>TELEPHONE:</b> _____ <b>EMAIL ADDRESS:</b> _____ <b>ON BEHALF OF:</b> _____ <b>NAME:</b> <u>Kim Hudson</u> <b>TITLE:</b> _____ <b>AFFILIATION:</b> <u>California Department of Insurance</u> <b>ADDRESS:</b> <u>300 South Spring St.</u> <u>Los Angeles, CA 90013</u>	<b>DATE:</b> <u>10/03/2019</u>	<b>FOR NAIC USE ONLY</b>
	Agenda Item # <u>2019-27BWG</u> Year <u>2020</u> Changes to Existing Reporting <input checked="" type="checkbox"/> [ X ] New Reporting Requirement <input type="checkbox"/> [ ]	<b>REVIEWED FOR ACCOUNTING PRACTICES AND PROCEDURES IMPACT</b>
	No Impact <input checked="" type="checkbox"/> [ X ] Modifies Required Disclosure <input type="checkbox"/> [ ]	<b>DISPOSITION</b>
	<input type="checkbox"/> [ ] Rejected For Public Comment <input type="checkbox"/> [ ] Referred To Another NAIC Group <input type="checkbox"/> [ ] Received For Public Comment <input checked="" type="checkbox"/> [ X ] Adopted Date <u>12/17/2019</u> <input type="checkbox"/> [ ] Rejected Date _____ <input type="checkbox"/> [ ] Deferred Date _____ <input type="checkbox"/> [ ] Other (Specify) _____	

**BLANK(S) TO WHICH PROPOSAL APPLIES**

- |   |   |   |
|---|---|---|
| <input checked="" type="checkbox"/> [ X ] ANNUAL STATEMENT                  | <input type="checkbox"/> [ ] QUARTERLY STATEMENT            |   |
| <input checked="" type="checkbox"/> [ X ] INSTRUCTIONS                      | <input type="checkbox"/> [ ] CROSSCHECKS                    | <input checked="" type="checkbox"/> [ X ] BLANK |
| <input checked="" type="checkbox"/> [ X ] Life, Accident & Health/Fraternal | <input checked="" type="checkbox"/> [ X ] Separate Accounts | <input checked="" type="checkbox"/> [ X ] Title |
| <input checked="" type="checkbox"/> [ X ] Property/Casualty                 | <input checked="" type="checkbox"/> [ X ] Protected Cell    | <input type="checkbox"/> [ ] Other _____        |
| <input checked="" type="checkbox"/> [ X ] Health                            | <input type="checkbox"/> [ ] Health (Life Supplement)       |   |

Anticipated Effective Date: Annual 2020

**IDENTIFICATION OF ITEM(S) TO CHANGE**

Remove the alphabetic index from inclusion at the back of the annual statement blank, instructions and Blanks Working Group Web page.

**REASON, JUSTIFICATION FOR AND/OR BENEFIT OF CHANGE\*\***

When the index was added back to being included in the hard copy of the annual statement states were still primarily using hard copies of the statement and the index make finding pages in the statement easier. Now the PDF copies of the statement are primarily used and are book marked, inclusion of the index in the statement is no longer needed.

**NAIC STAFF COMMENTS**

Comment on Effective Reporting Date: \_\_\_\_\_

Other Comments:

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

ANNUAL STATEMENT INSTRUCTIONS – LIFE/FRATERNAL, HEALTH, PROPERTY AND TITLE

INSTRUCTIONS

=====  
↓ **Detail Eliminated to Conserve Space** =====  
↓

INDEX

~~The annual statement shall contain an alphabetized index on the last page of the hardcopy statement, which references the title and page number of all of the pages that are required to be included in that filing. The NAIC shall maintain, and place on its Website at [www.naic.org/cmte\\_e\\_app\\_blanks.htm](http://www.naic.org/cmte_e_app_blanks.htm), the alphabetized index for all statement types that is required to be included in the hardcopy of the statement. The above is only required on the March 1 filing, and specifically excludes any supplements.~~

GENERAL

=====  
↓ **Detail Eliminated to Conserve Space** =====  
↓

ANNUAL STATEMENT INSTRUCTIONS – SEPARATE ACCOUNTS

INSTRUCTIONS

FOR COMPLETING SEPARATE ACCOUNTS ANNUAL STATEMENT BLANK

INDEX

~~The annual statement shall contain an alphabetized index on the last page of the hard copy statement which references the title and page number of all of the pages that are required to be included in that filing. The NAIC shall maintain, and place on its Website at [www.naic.org/cmte\\_e\\_app\\_blanks.htm](http://www.naic.org/cmte_e_app_blanks.htm), the alphabetized index for all statement types that is required to be included in the hard copy of the statement. The above is only required on the March 1 filing, and specifically excludes any supplements.~~

GENERAL

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↓ **Detail Eliminated to Conserve Space** =====  
↓

ANNUAL STATEMENT INSTRUCTIONS –PROTECTED CELL

INSTRUCTIONS

**For Completing Protected Cell Annual Statement Blank**

INDEX

~~The annual statement shall contain an alphabetized index on the last page of the hard copy statement which references the title and page number of all of the pages that are required to be included in that filing. The NAIC shall maintain, and place on its Website at [www.naic.org/cmte\\_e\\_app\\_blanks.htm](http://www.naic.org/cmte_e_app_blanks.htm), the alphabetized index for all statement types that is required to be included in the hard copy of the statement. The above is only required on the March 1 filing, and specifically excludes any supplements.~~

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↓ **Detail Eliminated to Conserve Space** =====  
↓

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