

Annual and Quarterly Statement Reporting

The NAIC accounting and reporting staff are responsible for implementing changes to annual and quarterly statement reporting (blanks and instructions) and risk-based capital formulas as directed by the Capital Adequacy (E) Task Force and Blanks (E) Working Group. Staff are available to assist state insurance regulators and industry with questions related to accounting, annual and quarterly statement reporting, company licensing (UCAA), filing issues, and risk-based capital.

BLANKS (E) WORKING GROUP

Mary Caswell, Sr. Manager I – Data Quality	mcaswell@naic.org	816-783-8409
Jill Youtsey, Manager I – FDR Data Quality	jyoutsey@naic.org	816-783-8419

CAPITAL ADEQUACY (E) TASK FORCE

Eva Yeung, Sr. Property/Casualty RBC Analyst & Technical Lead	eyeung@naic.org	816-783-8407
---------------------------------------------------------------	------------------------------------------------------	--------------

RISK-BASED CAPITAL:

Life and Fraternal Risk-Based Capital

Kazeem Okosun, Sr. Life RBC Analyst	kokosun@naic.org	816-783-8981
-------------------------------------	--------------------------------------------------------	--------------

Property/Casualty Risk-Based Capital

Eva Yeung, Sr. Property/Casualty RBC Analyst & Technical Lead	eyeung@naic.org	816-783-8407
---------------------------------------------------------------	------------------------------------------------------	--------------

Health Risk-Based Capital

Derek Noe, RBC Analyst	dnoe@naic.org	816-783-8973
------------------------	--------------------------------------------------	--------------

UNIFORM CERTIFICATE OF AUTHORITY APPLICATION (UCAA)

Jane Barr, Company Licensing Program Manager	jbarr@naic.org	816-783-8413
----------------------------------------------	----------------------------------------------------	--------------

ANNUAL AND QUARTERLY STATEMENT REPORTING:

Life/Fraternal Insurance Reporting

Jill Youtsey, Sr. Insurance Reporting Analyst	jyoutsey@naic.org	816-783-8419
Kristi Montanelli, Sr. Insurance Reporting Specialist – Health	kmontanelli@naic.org	816-783-8408
Robin Harris, Insurance Reporting Analyst II	rharris2@naic.org	816-783-8833

Property/Casualty/Title Insurance Reporting

Lauren Cooke, Insurance Reporting Analyst II	lcooke@naic.org	816-783-8773
Dawn Riley, Insurance Reporting Analyst II	driley1@naic.org	816-783-8802

Health Insurance Reporting

Mary Caswell, Sr. Manager I – Data Quality	mcaswell@naic.org	816-783-8409
Kristi Montanelli, Sr. Insurance Reporting Specialist – Health	kmontanelli@naic.org	816-783-8408

Investment Schedules Reporting

Jill Youtsey, Sr. Insurance Reporting Analyst	jyoutsey@naic.org	816-783-8419
Kristi Montanelli, Sr. Insurance Reporting Specialist – Health	kmontanelli@naic.org	816-783-8408

w:\qa\blanksproposals\forms & misc\annual and quarterly statement reporting contacts_rev 8.2022.docx