

Annual and Quarterly Statement Reporting

The NAIC accounting and reporting unit 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 the Blanks (E) Working Group. Staff are available to assist regulators and industry with questions related to accounting, annual and quarterly statement reporting, company licensing (UCAA), filing issues and risk-based capital. A list of contacts is provided below.

BLANKS (E) WORKING GROUP

Mary Caswell, Sr. Manager I – Data Quality	mcaswell@naic.org	816-783-8409
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CAPITAL ADEQUACY (E) TASK FORCE

Jane Barr, Company Licensing and RBC Manager	jbarr@naic.org	816-783-8413
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RISK-BASED CAPITAL:

Life and Fraternal Risk-Based Capital

Dave Fleming, Sr. Insurance Reporting Analyst	dfleming@naic.org	816-783-8121
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Property/Casualty Risk-Based Capital

Eva Yeung, Sr. Insurance Reporting Analyst	eyeung@naic.org	816-783-8407
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Health Risk-Based Capital

Crystal Brown, Sr. Insurance Reporting Analyst	cbrown@naic.org	816-783-8146
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UNIFORM CERTIFICATE OF AUTHORITY APPLICATION (UCAA)

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ANNUAL AND QUARTERLY STATEMENT REPORTING:

Life/Fraternal Insurance Reporting

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Kristi Montanelli, Sr. Insurance Reporting Specialist - Health	kmontanelli@naic.org	816-783-8408

Property/Casualty/Title Insurance Reporting

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Health Insurance Reporting

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Investment Schedules Reporting

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