

TeamMate Support Resources

NAIC Resources

The NAIC Help Desk is your 1st point of contact for all TeamMate and Citrix service. They will route and track your request for assistance.

NAIC Help Desk (816) 783-8500

help@naic.org

Financial Exam Support (FCEH handbook)

Bailey Henning

Financial Examination Manager

BHenning@naic.org

(816) 783-8129

Financial Analysis Support (FAH handbook)

Andy Daleo

Financial Analysis - Sr. Manager

ADaleo@naic.org

(816) 783-8141

Market Regulation Support (Mkt Reg handbook)

Petra Wallace

Market Regulation Specialist II

PWallace@naic.org

(816) 783-8272

TeamMate - Advanced Support Issues

James Portuguez

Electronic Workpaper Program Manager

JPortuguez@naic.org

(816) 783-8534

TeamMate Resources

When seeking help direct from TeamMate Support, be sure to tell them that you are with the NAIC. That is how your license is tracked, unless you purchased TeamMate directly from Wolters Kluwer.

Online Assistance

TeamMate Connect <https://www.teammateconnect.com>

Technical Support

(800) 449-8112 TeammateSupport@wolterskluwer.com

NAIC TeamMate Training

Your department of insurance may be eligible for tuition free TeamMate training. Contact Frances Stuart for more information.

Frances Stuart

Manager III - Education & Training

FStuart@naic.org

(816) 783-8586