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, Data Quality Manager  
Calvin Ferguson, Sr. Insurance Reporting Analyst

**CAPITAL ADEQUACY (E) TASK FORCE**

Jane Barr, Company Licensing and RBC Manager

**RISK-BASED CAPITAL:**

- **Life and Fraternal Risk-Based Capital**  
  Dave Fleming, Sr. Insurance Reporting Analyst

- **Property/Casualty Risk-Based Capital**  
  Eva Yeung, Sr. Insurance Reporting Analyst

- **Health Risk-Based Capital**  
  Crystal Brown, Sr. Insurance Reporting Analyst

**UNIFORM CERTIFICATE OF AUTHORITY APPLICATION (UCAA)**

Jane Barr, Company Licensing and RBC Manager  
Crystal Brown, Sr. Insurance Reporting Analyst

**ANNUAL AND QUARTERLY STATEMENT REPORTING:**

- **Life/Fraternal Insurance Reporting**  
  Cheryl Manning, Insurance Reporting Analyst III  
  Jill Youtsey, Insurance Reporting Analyst II  
  Jon Borcherding, Insurance Reporting Analyst II  
  Kristi Montanelli, Sr. Insurance Reporting Analyst

- **Property/Casualty/Title Insurance Reporting**  
  Jean Buckley, Insurance Reporting Analyst III  
  Calvin Ferguson, Sr. Insurance Reporting Analyst  
  Cheryl Manning, Insurance Reporting Analyst III

- **Health Insurance Reporting**  
  Mary Caswell, Data Quality Manager  
  Kristi Montanelli, Sr. Insurance Reporting Analyst  
  Calvin Ferguson, Sr. Insurance Reporting Analyst

- **Investment Schedules Reporting**  
  Jill Youtsey, SCA Valuation and Insurance Reporting Analyst II  
  Kristi Montanelli, Sr. Insurance Reporting Analyst

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