



User's Manual



Table of Contents

1. Getting Started	3
About InsData	3
Filing Due Dates	3
System and Support Hours	4
Contact Information	4
System Requirements	4
Browser Settings	4
Pricing Information	4
Refunds	4
Payment Information	5
CSV Format	5
Unavailable PDF's	5
2. InsData Home Page & System Overview	6
InsData Home Page	6
InsData Page	7
3. Using the System	8
How to Sign Up	8
How to Log In	12
How to Perform an InsData Search	15
How to Add, Remove and Clear Items from Cart	17
How to Pay for Order	18
How to Download Order	21
How to Obtain Invoice	23
How to View Order History	25
How to Reset Password	26
4. Frequently Asked Questions	28
5. PDF Detail	29

1 | Getting Started

About InsData

InsData is a self-service application that allows users to purchase the financial statement(s) of more than 4,800 multi-state insurance companies in a pdf format. These insurance companies are regulated by the state departments of insurer. Each year the insurer files their annual and quarterly financial statements with the National Association of Insurance Commissioner (NAIC) and with their state insurance department.

The data available from InsData comes from the NAIC's proprietary Financial Data Repository (FDR). This database houses all the financial statements received from the insurers.

The pdf's available from InsData are provided 'AS IS'. The truth, accuracy, availability, adequacy or completeness of the data cannot be guaranteed. Because insurers file their statements under specific content and security criteria, it is the responsibility of the insurer to ensure that their filings adhere to the set guidelines and that their filing is received on time.

The data available on InsData is subject to being updated by the insurer at any given time. In the event that a statement is amended, the InsData user will not be notified of the change. However, the amendment will be available to the insurer from within their order. InsData offers up to 10 years of annual and quarterly data in a pdf format.

Filing Due Dates

Annual and quarterly data are due at specific times during the year. It is the insurer's responsibility to submit the filing in a timely manner. If the insurer does not submit their filing by the due date, the InsData Administrator is not able to determine the day the filing will be submitted or if the filing will be submitted at all.

The data is always available immediately after the insurer files their statement. For annual data, depending on the data type, the due dates are: first day of March, April, May and June. For quarterly data the due dates are: fifteenth day of May, August and November. For a detailed look at specific data and their due dates, please visit FDR's Annual & Quarterly Financial Statement Filing Deadlines webpage at: http://www.naic.org/industry_filing_participation_deadlines.htm

System and Support Hours

InsData is available 24 hours a day, seven days a week. However, the official system hours are 8:30 a.m. to 5 p.m. Central Time. The system is not available during system maintenance. When the system is not available, a message on the InsData home page will be posted to notify its system users of the change.

System support is provided by the NAIC Help Desk, the InsData Administrator, and other NAIC staff as necessary. Support hours are Monday through Friday, 8:30 am to 5:00 pm Central Time, excluding holidays and /or other periods of time when the NAIC offices may be closed.

Contact Information

Questions about the InsData application or assistance with User ID's or passwords should be directed to the Help Desk (816-783-8500 or help@naic.org)

System Requirements

The NAIC does not endorse or require the use of any specific internet browser. For InsData, Google Chrome is recommended. Other browser versions and operating system platforms may have received some testing and are not excluded as options for viewing the websites but have not been thoroughly evaluated for compatibility – using them may yield unintended viewing results.

Browser Settings

Regardless of which browser or operating system is used, JavaScript and Cascading Style Sheets (CSS) should be enabled for the best results. These features add improved usability, and help to organize the content in an accessible manner.

Pricing Information

Key Annual Statement Pages: \$12.50 (*per company code, per year*)

Non-Key Annual Statement Pages: \$12.50 (*per company code, per year*)

Quarterly Statement Pages: \$3.75 (*per company code, per quarter, per year*)

Refunds

All InsData pdf's purchases are final; the NAIC does not provide refunds or exchanges.

Payment Information

In order to provide users of InsData with the quickest access possible to the InsData pdf's a credit card is required at the time of purchase. Currently we accept Visa, Discover, American Express and Master Card.

CSV Format

Financial Statement Data is available in a csv format from the Insurance Data Products Department. If interested in obtaining financial statement data in a csv format please email the IDP Department at idp@naic.org

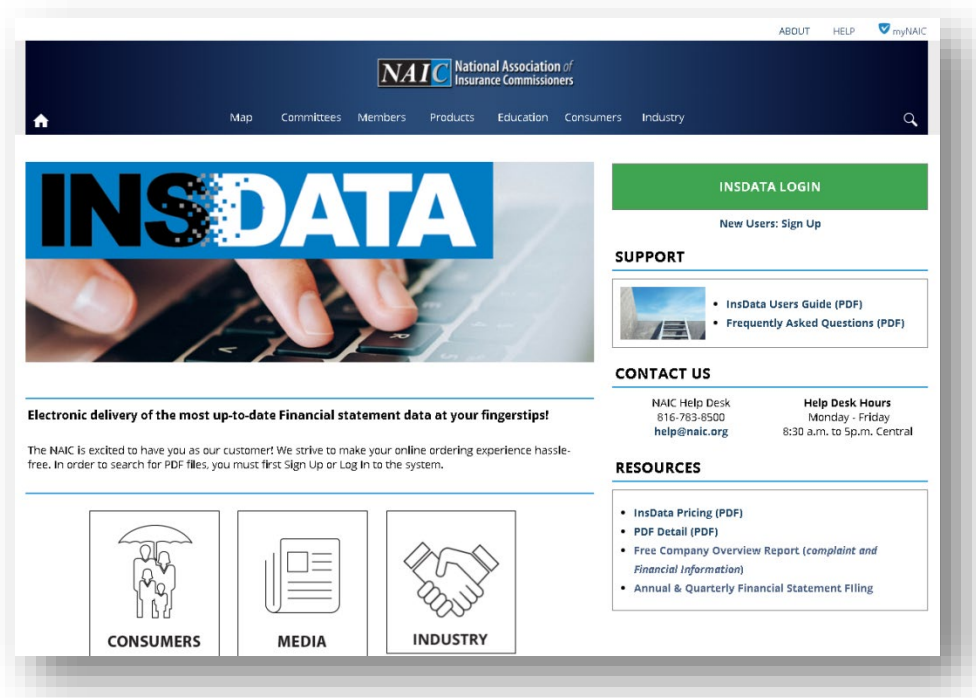
Unavailable PDF's

InsData users will not be able to add an 'unavailable' PDF to their cart if the PDF is considered confidential, if the insurer has not filed the statements, or where the domiciliary state has requested to be contacted directly. Confidential financial statements or data unavailable include but are not limited to the following:

- The financial statement for captive insurers
- The quarterly financial statement for non-HMO insurers who are domiciled and only write business in the state of New Jersey
- The financial statement for certain state funds
- The Supplemental Compensation Exhibit
- The Supplemental Health Care Exhibit Allocation Report
- RBC Information

2 | InsData Home Page & System Overview

URL for InsData home page: www.naic.org/insdata_home.htm



The InsData Home Page

InsData Login link: Link for current users to log into the system.

New User Sign Up Link: Link for new users to obtain user id and password.

InsData Users Guide: PDF of guide with InsData direction and instruction.

PDF Data Detail : PDF of key and non-key pages content.

Frequently Asked Questions: PDF of frequently asked questions.

Help Desk Email/Phone: Link for assistance with log in or system issues.

InsData Pricing: PDF of pricing, payment and refund information.

Free Company Overview Report: Link to free insurer summary report

Annual & Quarterly Financial Statement Filing Deadlines: Link that provides information about when specific data within the financial statement is due

Consumer link: Link for consumer information.

Media link: Link for media information.

Industry link: Link for industry information.

After the InsData User has secured a user id and password (See page 8 – How to Sign Up), they will be able to log into the InsData system.

The following page will display once the user signs in.

The screenshot shows the InsData web application interface. At the top, there is a header with the NAIIC logo (National Association of Insurance Commissioners) and the text "INS DATA". To the right of the header are links for "ABOUT", "HELP", and a user profile icon labeled "John". Below the header is a navigation bar with tabs for "Company Search", "Orders", and "Account". On the right side of the navigation bar is a "Cart (0)" icon. The main content area is titled "Company Search" and contains two input fields: "Company Name" and "Company Code". Below these fields are "Search" and "Reset" buttons. To the right of the input fields, there is a prompt: "Enter at least one criterion to begin your search." At the bottom of the page, there is a footer with contact information for NAIIC Central Office, NAIIC Executive Office, and Capital Markets Group, Investment Analysis Office. It also includes an address (1100 Walnut Street, Suite 1500, Kansas City, MO 64106-2187) and a service desk contact (816-733-8500, 8 a.m. to 4 p.m. (CT), Monday - Friday).

The InsData Page

Company Search: Where InsData user performs the company search.

Orders: Where InsData user views and downloads their order.

Account: Where InsData user can update their user profile.

Cart: Where InsData user verifies item(s) they have added to their order.

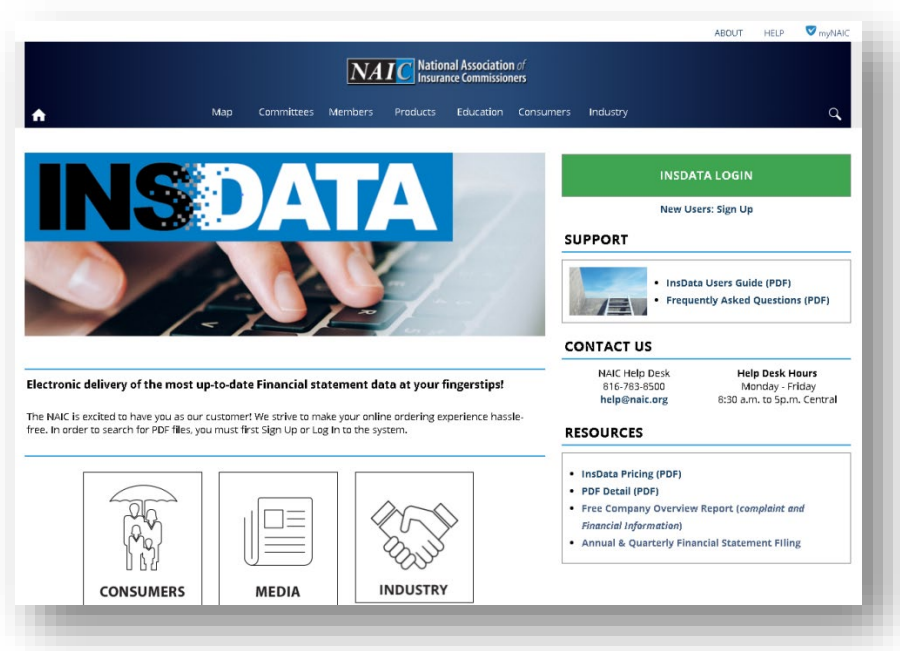
About: Where InsData user can view information about the InsData System.

Help: Where InsData user finds help with the InsData System

InsData Name Drop Down: Where InsData user views information about their Profile and where they can Log Out of the system.


3 | Using the System

The url for the InsData home page is: www.naic.org/insdata_home.htm. Login with your existing 'myNAIC' ID and password that is used with other NAIC applications, or sign up for a new account.



How to Sign Up

From the InsData home page select '**New Users: Sign Up**' and complete all fields on the new user registration page:



To register a new account, please complete the following form.

Email Address*

Confirm Email Address*


First Name*


Last Name*

After inputting password, select the “I’m not a robot” box and select continue to answer the security question.


New Password*


- Password is case sensitive.
- Must be at least 7 characters long.
- Must be no more than 30 characters long.
- Must include at least 1 number.
- Must have at least 1 lowercase letter.
- Must have at least 2 unique characters.
- Must not include any of the following values: / . , ' " ; \) (& @ password
- Must not include part of your name or user name.
- New password may not have been used previously.








Strength:
Strong

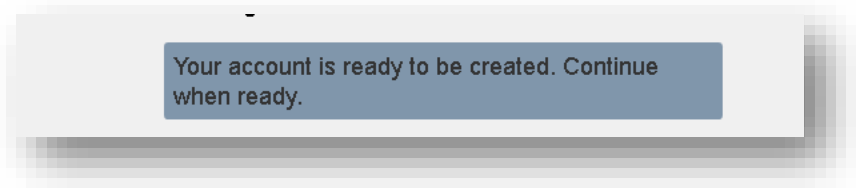


 I'm not a robot

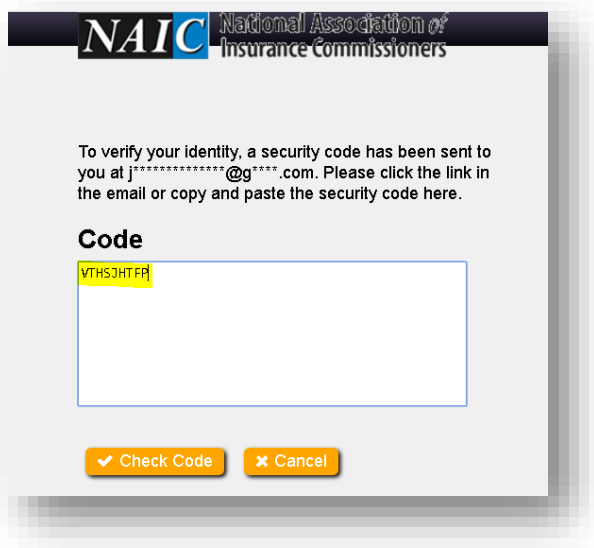

reCAPTCHA
[Privacy](#) - [Terms](#)

Once you have completed the fields successfully, a user verification email is sent and the following message displays:



After you select continue, the following page will display:



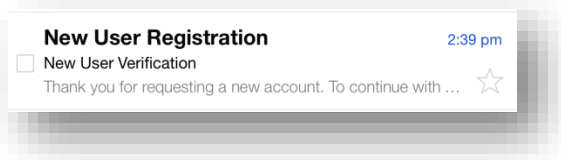
NAIC National Association of Insurance Commissioners

To verify your identity, a security code has been sent to you at j*****@g****.com. Please click the link in the email or copy and paste the security code here.

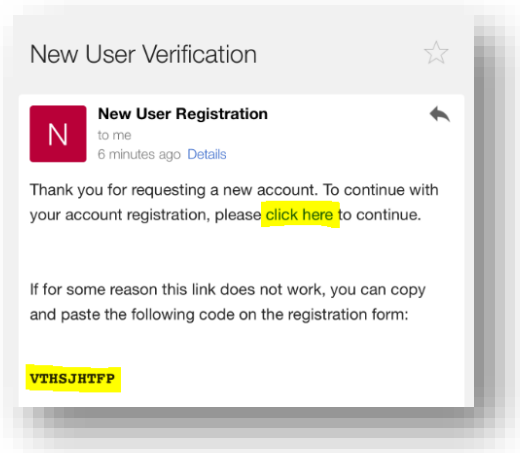
Code

VTHSJHTFP

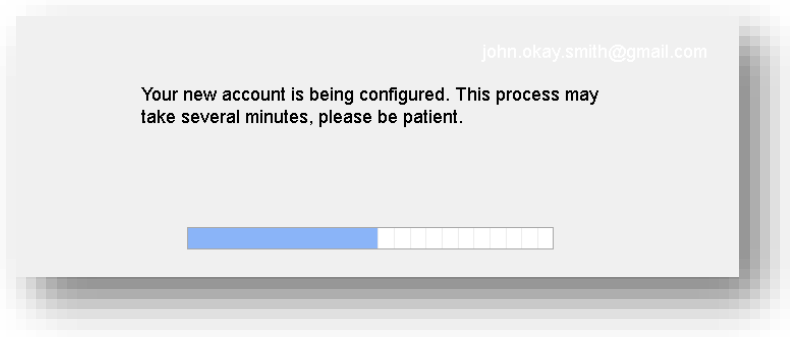
To obtain the code, go to the inbox of the email address you entered when you created your account. You will see a message with the subject line: New User Registration.



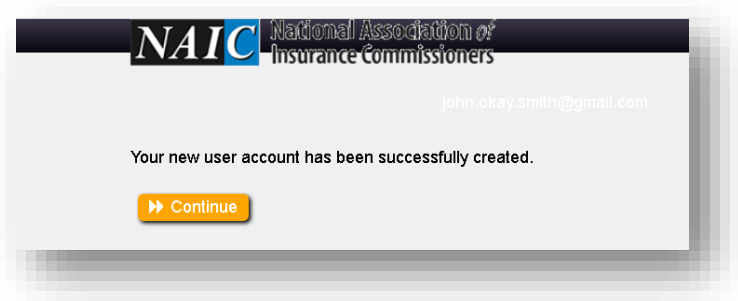
Open the email to obtain the code or you can select 'click here':



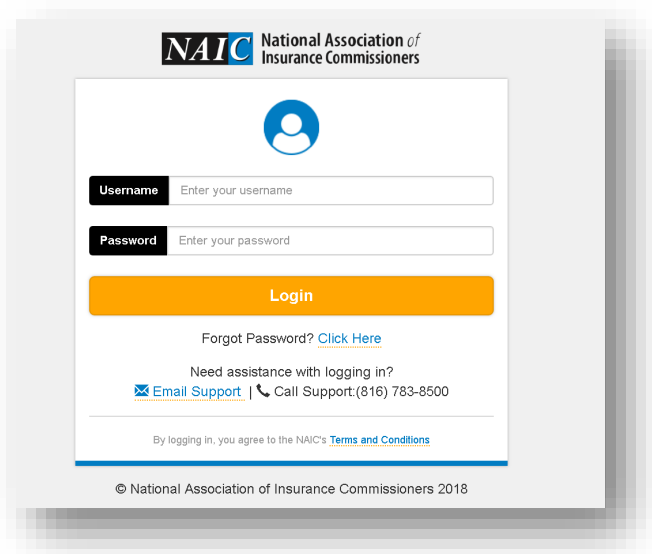
Once you click on the link within the body of the email or enter the code, the request for a new account will process. You will notice your new InsData User id in the upper right corner in white. Please make note of the InsData User ID which is typically your email address.



After the new account has been created, select continue:





You have successfully created a new account. The Login page now displays.



How to Log In

1. Go to www.naic.org/Insdata_home.htm and select “InsData Login” to access the InsData application. Within the InsData application select the “Login” button under the Login/Signup drop down box on the upper right section of the page.

The following page displays:



Username

Password

Login

Forgot Password? [Click Here](#)


Need assistance with logging in?


[✉ Email Support](#) | [📞 Call Support:\(816\) 783-8500](#)

By logging in, you agree to the NAIC's [Terms and Conditions](#)

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2. Enter your user name ('myNAIC' ID or email address for new users) and the password.

**National Association of
Insurance Commissioners**



Username

john.okay.smith@gmail.com

Password

.....

Login

Forgot Password? [Click Here](#)

Need assistance with logging in?

[✉ Email Support](#) | [☎ Call Support:\(816\) 783-8500](#)

By logging in, you agree to the NAIC's [Terms and Conditions](#)

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3. Read and agree to the terms of use in order to continue:

The screenshot shows the 'Terms of Use' page for InsData, a service provided by the National Association of Insurance Commissioners (NAIC). The page has a blue header with the NAIC logo and 'INS DATA' text. The main content area is white and contains the following sections:

- Terms of Use**: A heading for the agreement.
- InsData is the property of the NAIC. This Use Agreement is the exclusive statement of the terms under which the NAIC grants access to a user ("you").** In order to create an account and download PDFs, you agree to all of these terms and conditions without limitation or exception. By clicking on the 'Agree' button below, you are accepting all terms of this agreement. As the owner of InsData, the NAIC grants you a non-exclusive, non-transferable license to use this data according to the terms and conditions stated herein.
- Use of the Data**: You agree to use this data for non-commercial use only and you agree not to market, sell or otherwise distribute this data in electronic or printed form, including on a local area network, without the prior written authorization of the NAIC. Modification or removal of copyright notices provided with the data is also prohibited. You agree that you will not reverse engineer, reverse assemble or reverse compile the application. You recognize that unauthorized or improper use or dissemination of materials or modification of the system may result in immediate termination of access and possibly other disciplinary and/or legal action. You expressly consent to NAIC monitoring of your access for administrative and security purposes.
- No Warranties**: The NAIC MAKES NO WARRANTY OR PROMISE, EITHER EXPRESS OR IMPLIED, with respect to the data provided herein and expressly disclaims the IMPLIED WARRANTY OF MERCHANTABILITY AND FITNESS FOR ANY PARTICULAR PURPOSE. The data available from InsData is provided from the NAIC's proprietary Financial Data Repository. Insurance companies file annual statements with NAIC under specific content and security criteria, and it is each company's responsibility to ensure its filings meet these guidelines. Annual statement filings are provided 'AS IS', and the NAIC does not guarantee the truth, accuracy, adequacy or completeness of the data and is not responsible for any errors or omissions or the result obtained from the use of such data. You acknowledge that data is subject to being updated by the company, but that the NAIC will not notify you of any updates or provide them as a part of this order. The NAIC does not guarantee InsData will operate free of error or interruption.
- Limitation of Liability**: The NAIC specifically disclaims any liability, whether based in contract, tort, strict liability or otherwise, for any direct, indirect, incidental, consequential or special damages arising out of or in any way connected with access to or use of InsData and the data obtained through it.
- General/Miscellaneous**: All orders of PDFs through InsData are final; the NAIC shall not provide any refunds or exchanges. The laws of the State of Missouri shall be applicable to the interpretation of these terms, without regard to any conflict of law provisions. If any provision within these terms is held to be invalid or unenforceable, all remaining provisions shall be enforced. The NAIC reserves the right at any time to modify or discontinue, temporarily or permanently, InsData without notice. The NAIC may revise these Terms of Use at any time by updating this posting.

At the bottom of the page, there are two buttons: 'Agree' and 'Cancel'.

4. After you select agree, the following page displays:

The screenshot shows the 'Company Search' page on the InsData website. The page has a blue header with the NAIC logo and 'INS DATA' text. The main content area is white and contains the following elements:

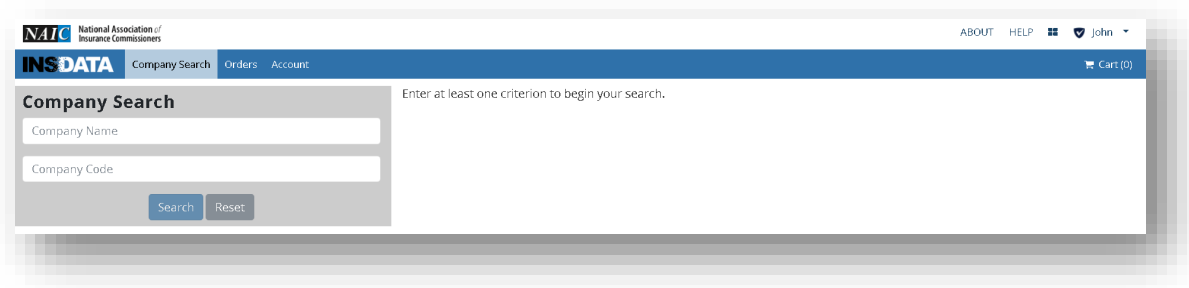
- Company Search**: A heading for the search section.
- Search Criteria**: Two input fields labeled 'Company Name' and 'Company Code'.
- Search Buttons**: Two buttons labeled 'Search' and 'Reset'.
- Search Prompt**: A text prompt that says 'Enter at least one criterion to begin your search.'

How to Perform an InsData Search

The Company search menu offers two ways to search:

- Company Name
- Company Code - A unique five digit number assigned to each insurance company.

1. From the Company Search page



The screenshot shows the InsData website's 'Company Search' page. The header includes the NAIC logo and navigation links for 'ABOUT', 'HELP', and a user profile 'John'. The main navigation bar has 'INS DATA', 'Company Search', 'Orders', and 'Account'. A 'Cart (0)' icon is in the top right. The 'Company Search' section has two input fields: 'Company Name' and 'Company Code'. Below these are 'Search' and 'Reset' buttons. A message on the right says 'Enter at least one criterion to begin your search.'

2. Enter company code or company name in search field and select search. The search returns 10 years of company filings for both annual and quarterly data. Select the drop down for the desired year.



The screenshot shows the search results for 'American Century Life Ins Co TX'. The left sidebar shows the search criteria: 'Company Name' and 'Company Code' (99600). The main content area has a 'Return to Search Results' link and the company name. Below this, the address is listed: 'Address: 9120 S TOLEDO AVENUE, TULSA, OK 74137'. The home office is 'OK' and the code is 'CoCode: 99600'. A list of annual filings is shown with dropdown arrows for each year from 2017 to 2008.

Year	Filing Type
2017	Annual Filings
2016	Annual Filings
2015	Annual Filings
2014	Annual Filings
2013	Annual Filings
2011	Annual Filings
2010	Annual Filings
2009	Annual Filings
2008	Annual Filings

3. The Key and Non-Key Pages for the desired year are displayed:

The screenshot displays the INSData website interface. The top navigation bar includes the NAIC logo, "National Association of Insurance Commissioners", and links for "ABOUT", "HELP", and a user profile "John". Below this, a blue header bar contains the "INSData" logo and navigation tabs for "Company Search", "Orders", and "Account", along with a "Cart (0)" icon.

The main content area is titled "Company Search" and features a search form with fields for "Company Name" and "99600", and buttons for "Search" and "Reset". To the right, the search results for "American Century Life Ins Co TX" are displayed. A link to "Return to Search Results" is provided. The company's address is listed as "9120 S TOLEDO AVENUE, TULSA, OK 74137", with "Home Office: OK" and "CoCode: 99600".

Under the "2017 Annual Filings" section, two categories of documents are shown:

- Key Annual Statement Pages** (Price: \$12.50):

FILE NAME	STATEMENT TYPE	VERSION	DATE FILED
Key Annual Statement Pages	Life, Accident, And Health	Original	03/01/2018

- Non-Key Annual Statement Pages** (Price: \$12.50):

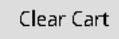
FILE NAME	STATEMENT TYPE	VERSION	DATE FILED
Statement Pages	Life, Accident, And Health	Original	03/01/2018

*** Please note** that if you order the non-key statement pages prior to March 1st, all of the pages will not be included in your order. The pages will be automatically added to your original order as they become available. You can download your order again at any time to obtain new pages once they have been added to InsData.

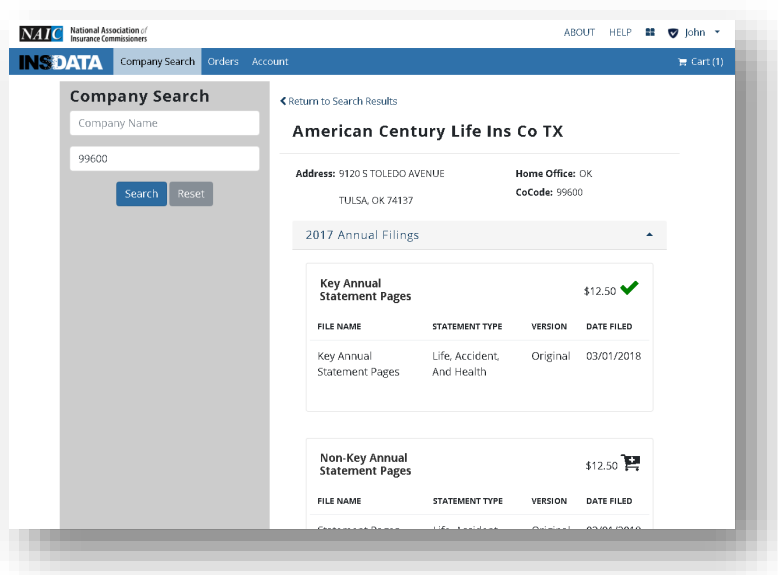
How to Add, Remove and Clear Items from Cart

Clicking on the cart icon  will add an item to your cart.

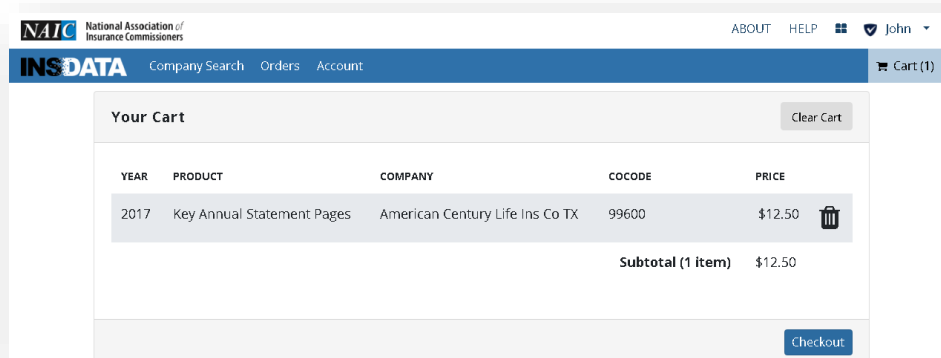
Clicking on the trash bin icon  will remove an item from your cart.

Clicking on the clear all button  will remove all items from your cart.

1. Click on the cart icon for the pages you would like to purchase. The selection is added to the cart. The cart icon is replaced by a green checkmark.



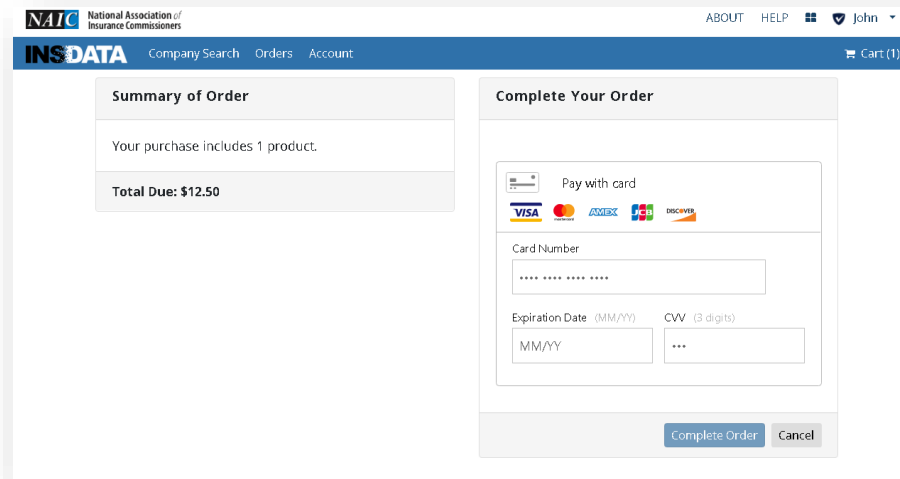
Once you are ready to check out, select the cart icon in the menu bar. Verify the selection(s) displayed are valid and then click on the checkout button. *(If the selection(s) are not valid, select the Clear Cart icon to start over or select the delete icon to remove applicable statements.)*



How to Pay for Order

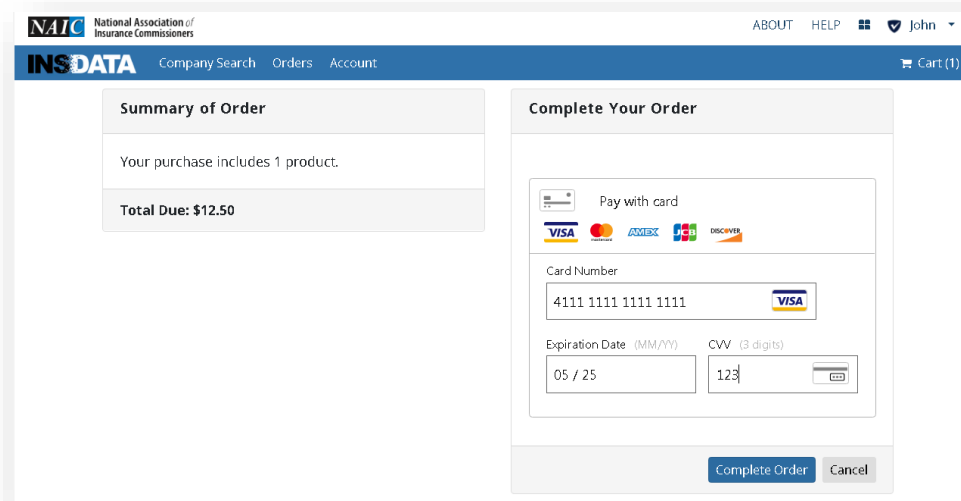
The InsData System accepts Visa, MasterCard Discover and American Express. It is important to confirm your order as we do not offer refunds or exchanges. If you are not sure if your order contains the page you want, please review the PDF Detail section prior to placing your order.

1. After selecting the Checkout button the payment page displays:



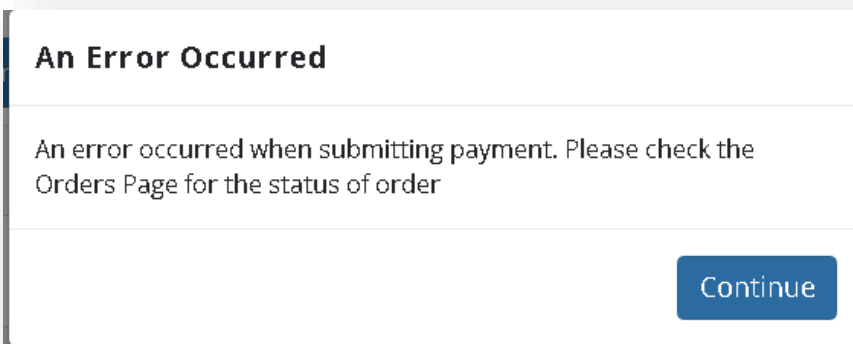
The screenshot shows the InsData website's payment interface. On the left, a 'Summary of Order' box states 'Your purchase includes 1 product.' and 'Total Due: \$12.50'. On the right, the 'Complete Your Order' section features a 'Pay with card' heading and logos for Visa, MasterCard, American Express, and Discover. Below these are three input fields: 'Card Number' (with a masked pattern of asterisks), 'Expiration Date (MM/YY)' (with a masked pattern of 'MM/YY'), and 'CVV (3 digits)' (with a masked pattern of '***'). At the bottom right of this section are two buttons: 'Complete Order' and 'Cancel'.

2. Review summary of order to confirm purchase and then proceed by inputting credit card information, expiration date and security code. Select Complete Order to complete purchase.

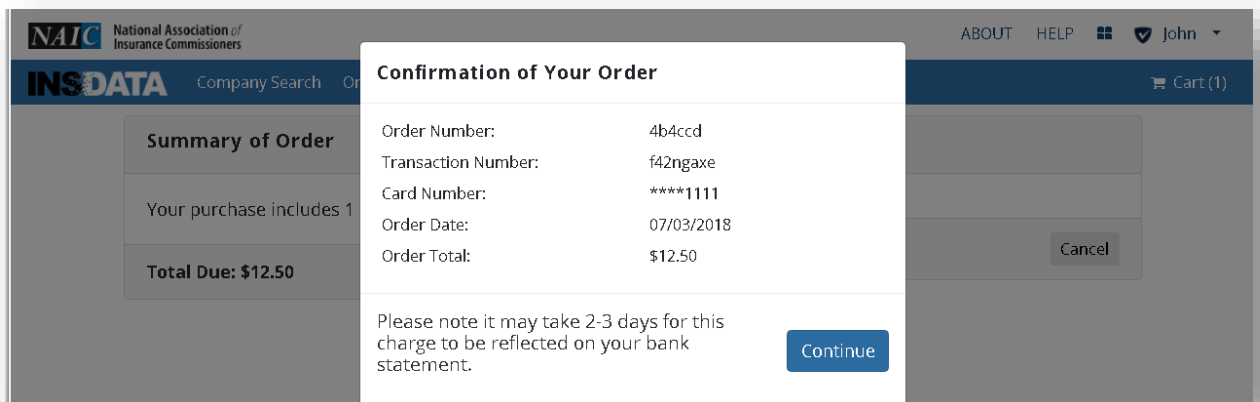


This screenshot shows the same payment page as the previous one, but with sample credit card information entered. The 'Card Number' field now contains '4111 1111 1111 1111' and is accompanied by a Visa logo. The 'Expiration Date (MM/YY)' field contains '05 / 25'. The 'CVV (3 digits)' field contains '123' and is accompanied by a small card icon. The 'Complete Order' and 'Cancel' buttons remain at the bottom right.

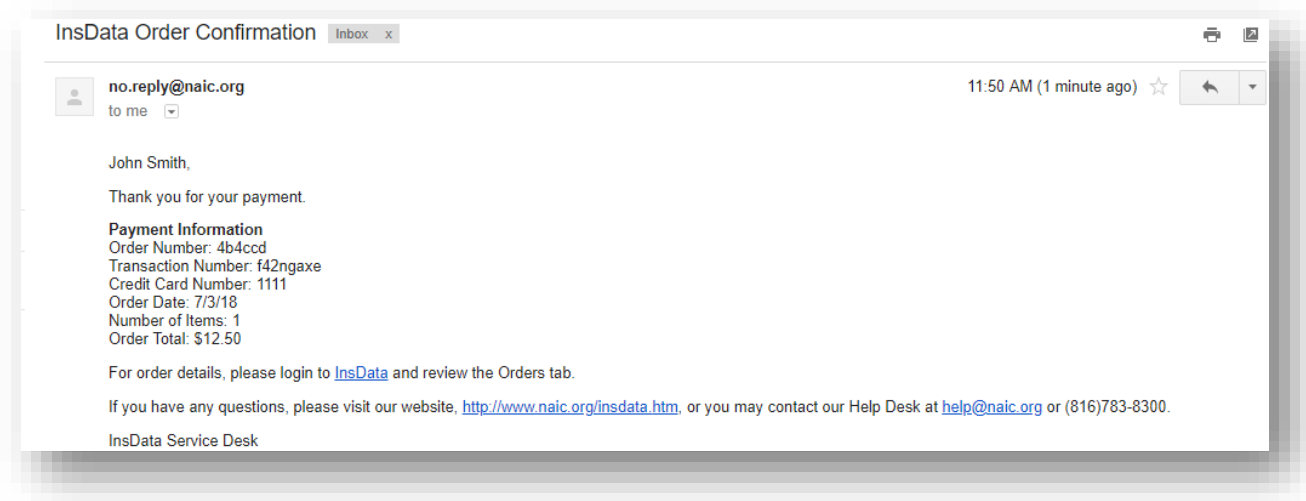
3. If you receive an error, please check the order page to confirm the order completed successfully. If you do not see the order, please click on the help link for assistance.



4. The following screen will display if the order completed successfully:
Select continue to proceed to the order.



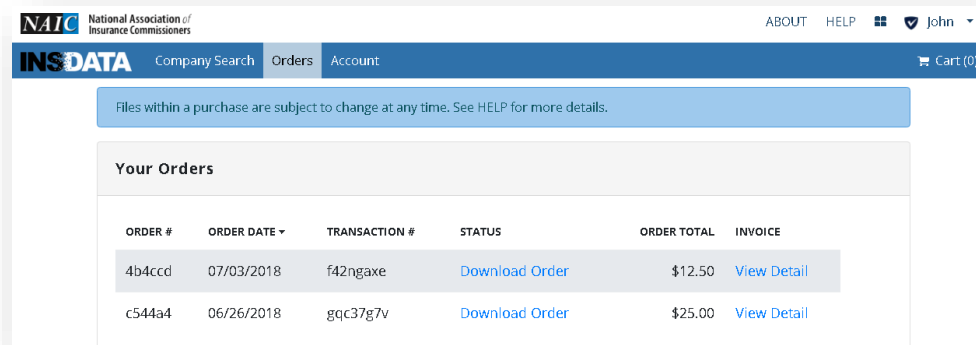
5. You will also receive email notification in your inbox which also serves as a receipt:



How to Download Order

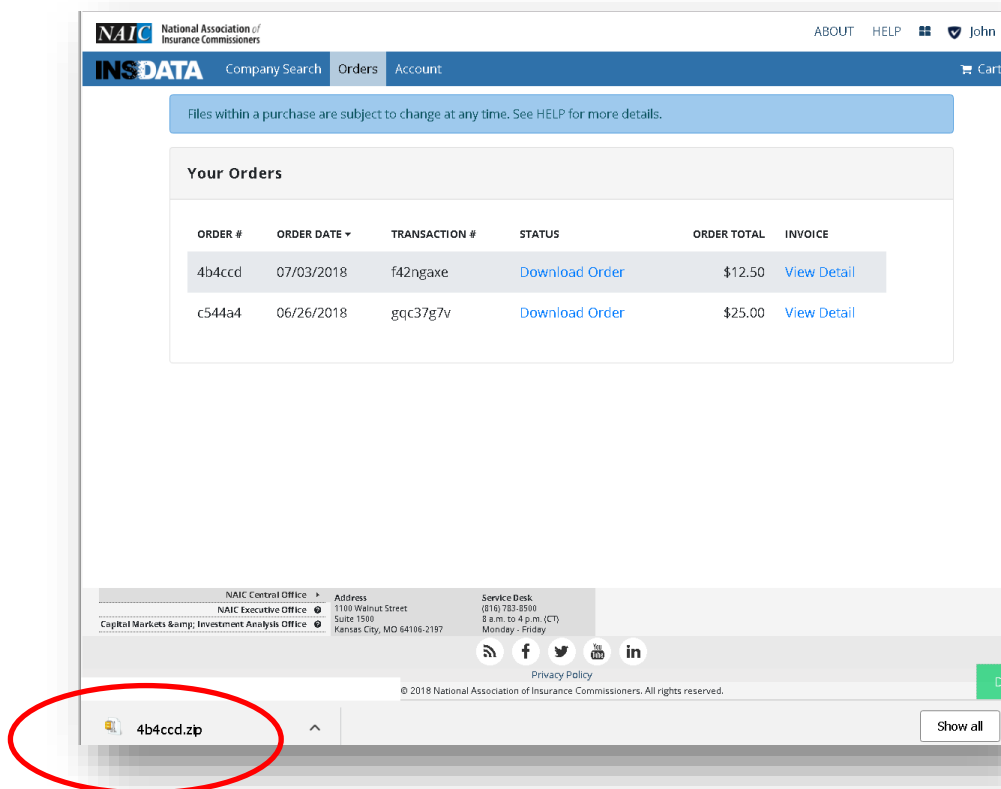
Statement pages available from InsData come in a PDF format. The PDF's are zipped into one file and made available to download under the Order Tab.

1. To download the order, click on the Download Order link:
If nothing happens after you click on the link, verify your pop up block is turned off.

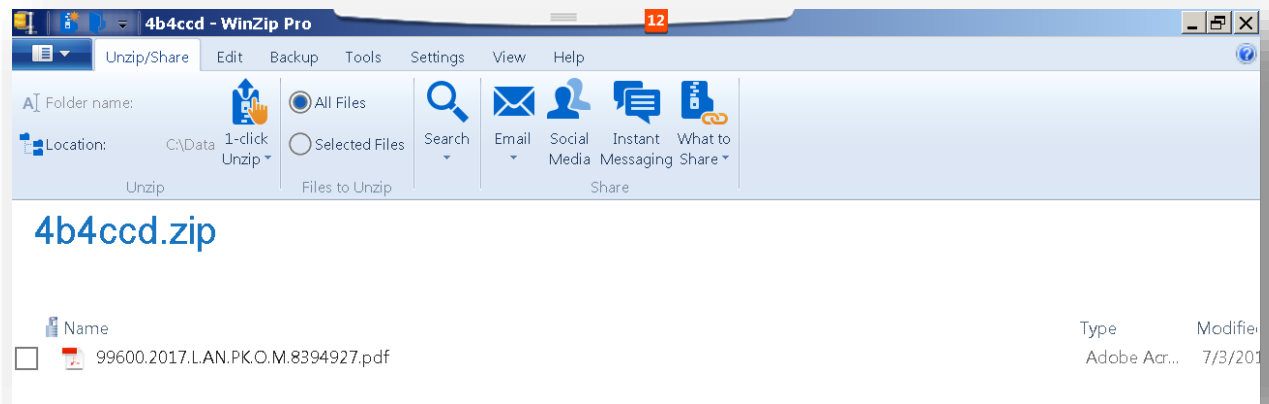


ORDER #	ORDER DATE ▾	TRANSACTION #	STATUS	ORDER TOTAL	INVOICE
4b4ccd	07/03/2018	f42ngaxe	Download Order	\$12.50	View Detail
c544a4	06/26/2018	gqc37g7v	Download Order	\$25.00	View Detail

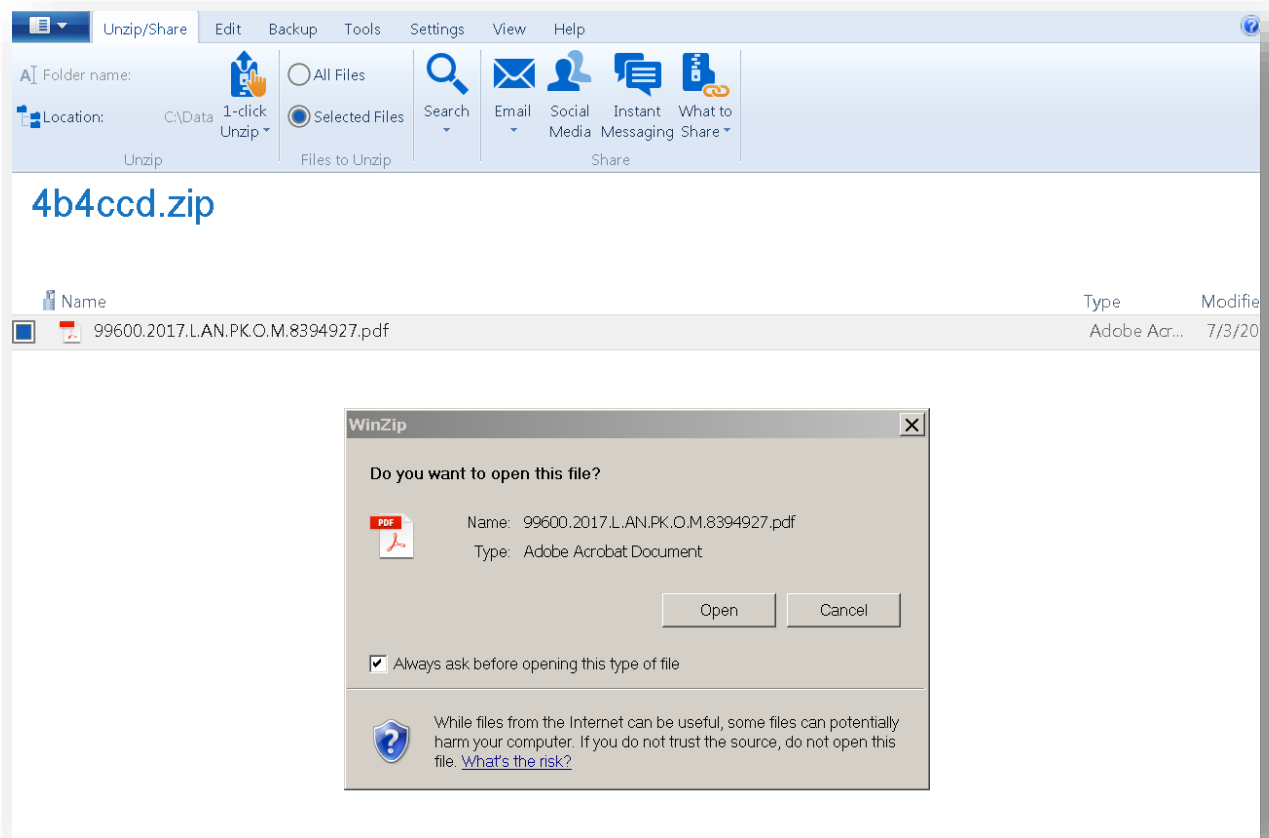
2. The zip file should display:



3. Double Click on the zip file to open up the order. The PDF pages will display.



4. Double click on the PDF file to open:



How to Obtain Invoice

The InsData Order confirmation email and the Order Details page serves as the InsData invoice.

1. To obtain a copy of the InsData receipt, from the Orders tab, select the View Detail link of the order you would like a receipt for:

Files within a purchase are subject to change at any time. See HELP for more details.

Your Orders

ORDER #	ORDER DATE ▼	TRANSACTION #	STATUS	ORDER TOTAL	INVOICE
4b4ccd	07/03/2018	f42ngaxe	Download Order	\$12.50	View Detail
c544a4	06/26/2018	gqc37g7v	Download Order	\$25.00	View Detail

2. Right click the order details page:

Order Details

Order Number: 4b4ccd
Order Date: 07/03/2018
of Products: 1

Transaction #: f42ngaxe
Card Number: ****1111
Order Total: \$12.50

America...	99600	2017	Key Annu...	\$12.50
------------	-------	------	-------------	---------

3. Right Click the page to print and use as a receipt.

Print

Total: **1 sheet of paper**

[Print](#) [Cancel](#)

Destination: **NAIC Color 803**
HP Color LaserJet Flow MF...

[Change...](#)

Pages: ☒ All
☐ e.g. 1-5, 8, 11-13

Copies:

Layout: [Portrait](#)

Color: [Color](#)

Options: ☐ Two-sided

[+ More settings](#)

[Print using system dialog... \(Ctrl+Shift+P\)](#)

7/3/2018

insdata/UserApp

INS

NAIC

Order Details

Order Number: 4b4ccd

Transaction #: f42ngaxe

Order Date: 07/03/2018

Card Number: ****1111

of Products: 1

Order Total: \$12.50

Am...

99...

2017

Ke...

\$1...

ORDER #	ORDER DATE	TRANSACTION #	STATUS	TOTAL	INVOICE
4b4ccd	07/03/2018	f42ngaxe	Download Order	\$12.50	View Detail
c544a4	06/26/2018	ggc37g7v	Download Order	\$25.00	View Detail

NAIC Central Office

Address

1100 Walnut Street

Suite 1500

Kansas City, MO 64106-2197

Service Desk

(816) 783-8500

8 a.m. to 4 p.m. (CT)

Monday - Friday

NAIC Executive Office

Address

444 North Capitol Street NW

Suite 700

Washington, DC 20001

Service Desk

(816) 783-8500

8 a.m. to 4 p.m. (CT)

Monday - Friday

Capital Markets & Investment Analysis Office

Address

One New York Plaza

Suite 4210

New York, NY 10004

Service Desk

(816) 783-8500

8 a.m. to 4 p.m. (CT)

Monday - Friday

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Privacy Policy

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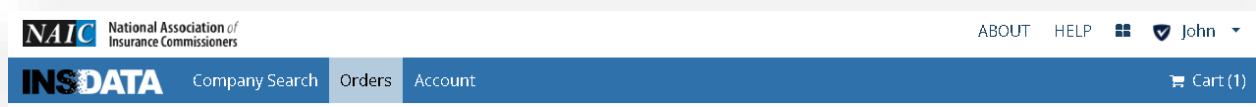
<https://insdata-devnaic.org/home/viewOrders>

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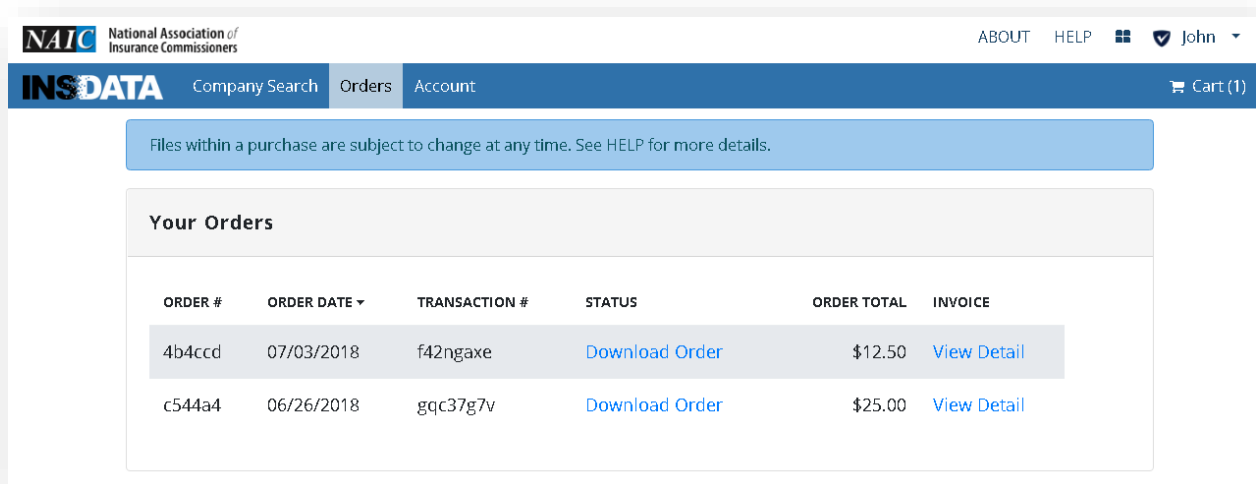
How to View Order History

The Order tab gives you a view of all your InsData Orders. The orders found on this tab never expire and will always be available to you.

1. Click on the Orders Tab:

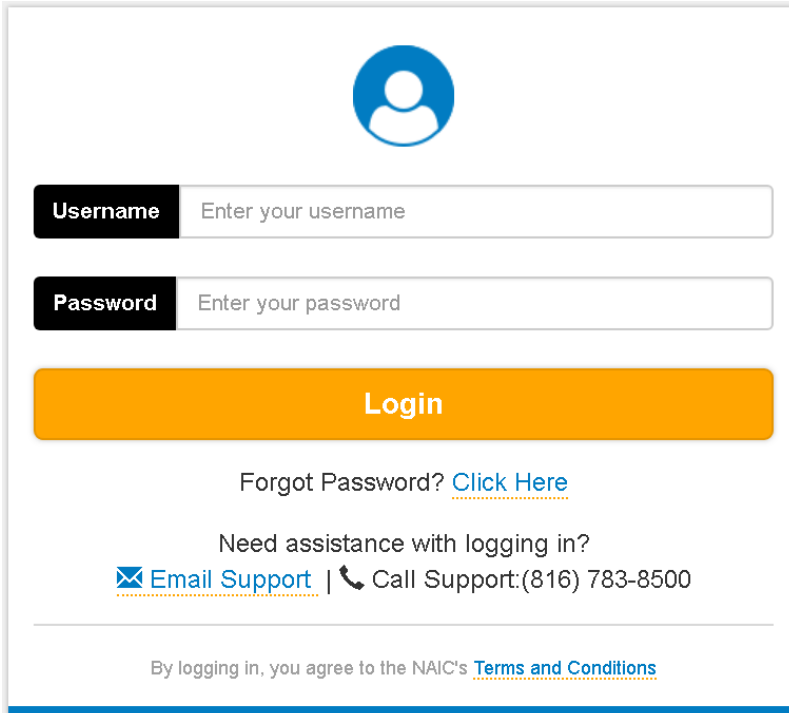


2. The Order number, order date, transaction number, status, order total and invoice columns display.

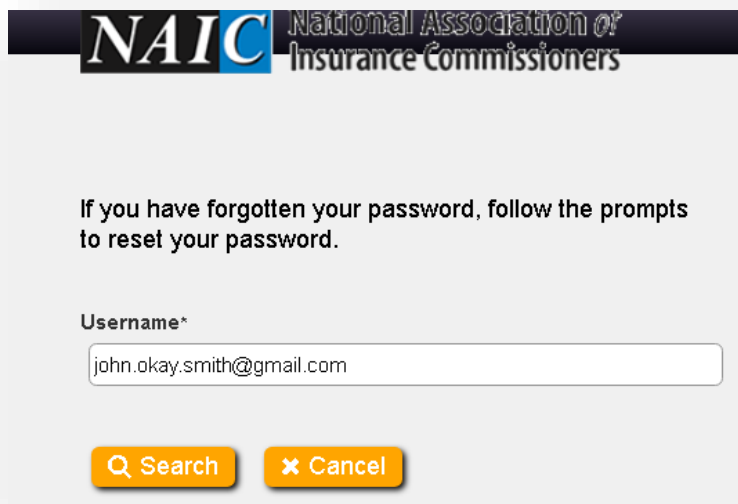


How to Reset Password

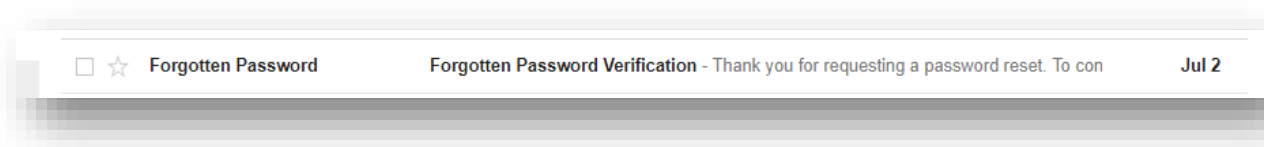
1. Go to https://naic.org/insdata_home.htm and select **INSDATA LOGIN**. After the selection, the following page will display. Select **Click Here**.

The image shows the NAIC INSDATA LOGIN page. At the top center is a blue circular icon with a white person silhouette. Below it are two input fields: 'Username' with the placeholder 'Enter your username' and 'Password' with the placeholder 'Enter your password'. Below these fields is a large orange button labeled 'Login'. Under the 'Login' button, there is a link 'Forgot Password? Click Here'. Below that, it says 'Need assistance with logging in?' followed by 'Email Support' (with an envelope icon) and 'Call Support: (816) 783-8500' (with a phone icon). At the bottom, it states 'By logging in, you agree to the NAIC's Terms and Conditions'.

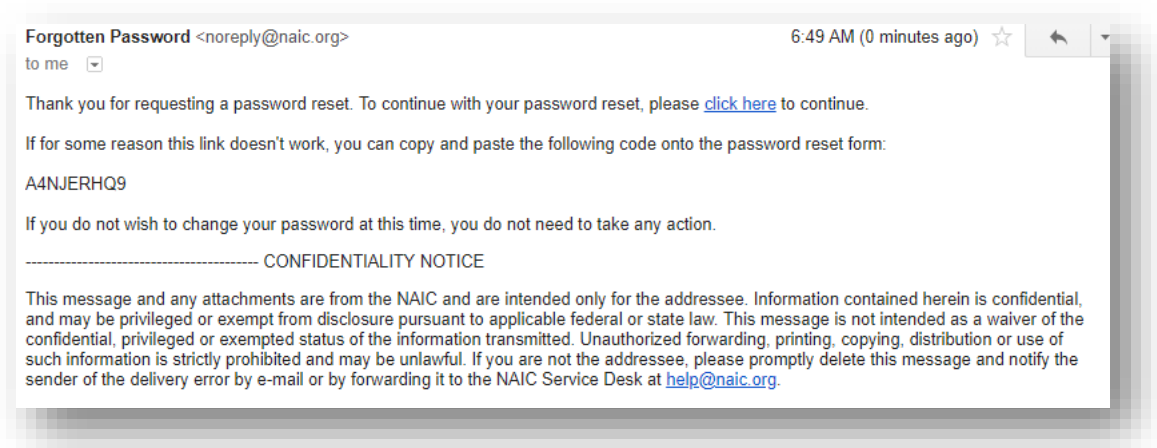
2. Enter Username and select **Search** button.

The image shows a password reset search form. At the top is the NAIC logo (National Association of Insurance Commissioners). Below the logo, it says 'If you have forgotten your password, follow the prompts to reset your password.' Below this is a 'Username*' label and an input field containing 'john.okay.smith@gmail.com'. At the bottom are two orange buttons: 'Search' (with a magnifying glass icon) and 'Cancel' (with an 'x' icon).

3. Go to inbox and open email with subject line 'Forgotten Password Verification':



4. Select **click here** (or copy provided code)



5. Enter the code on the displayed page and click 'Check Code' Button'

A screenshot of a web page titled 'Forgotten Password' with the subtitle 'Self Service Password Reset'. The page contains instructions: 'To verify your identity, a security code has been sent to you at j*****@g****.com. Please click the link in the email or copy and paste the security code here.' It also says: 'Your security code should arrive right away. If you have waited for a while and haven't yet received a code, click the resend code button to receive a new code.' There is a 'Resend Code' button with a circular arrow icon. Below that is a text input field labeled 'Code' which contains the text 'A4NJERHQ9'. At the bottom, there are two buttons: 'Check Code' with a checkmark icon and 'Cancel' with an 'X' icon.

4 | Frequently Asked Questions (FAQ's)

Q: Why can't I add an 'unavailable' item to my cart?

The company did not file, the financial statement data is considered confidential, or the domiciliary state has requested to be contacted directly.

The following list includes but is not limited to financial statement data that is not available for purchase:

- ❖ The financial statement for captive insurers
- ❖ The quarterly financial statement for non-HMO insurers who are domiciled in New Jersey and who only write business in the state of New Jersey.
- ❖ The financial statement for certain state funds
- ❖ The Supplemental Compensation Exhibit
- ❖ The Supplemental Health Care Exhibit Allocation Report
- ❖ RBC Information

Q: Why is my download missing data?

The data isn't due until later in the year, the insurer did not provide us with the data or the data is considered confidential.

Q: Can I receive this data in a csv format?

Yes. Contact the Insurance Data Products Department at idp@naic.org.

Q: Can I pay using PayPal or a Check

No. We currently only accept MasterCard, Visa, Discover and American Express

Q: Where can I find a specific page or schedule in my download?

In the PDF Data Detail Section

Q: What happened to the Data Request Form that allowed me to get 5 for free?

We are excited to offer our consumers a summary of the current year Financial Reports for Insurance Companies.

This report has replaced the '5 for Free' program and offers consumers an unlimited number of summary reports at no cost.

The report provides a summarized view of the companies premiums earned, assets and liabilities and can be obtained by going to naic.org>consumers>Consumer Information Source(CIS) and entering the company information, and then selecting 'Financial Information' followed by 'Get Company Overview'