

2024 Fall National Meeting
Denver, Colorado

PRODUCER LICENSING (D) TASK FORCE

Sunday, November 17, 2024
9:00 – 10:00 a.m.

Meeting Summary Report

The Producer Licensing (D) Task Force met Nov. 17, 2024. During this meeting, the Task Force:

1. Adopted its Oct. 31 minutes. During this meeting, the Task Force took the following action:
 - A. Adopted its Summer National Meeting minutes.
 - B. Adopted its 2025 proposed charges.
 - C. Adopted proposed amendments to the NAIC Uniform Licensing Applications.
 - D. Discussed amendments to the *Public Adjuster Licensing Model Act* (#228) to strengthen regulatory standards governing the conduct of public adjusters for the following four issues: 1) individuals acting as unlicensed public adjusters; 2) contractors who are also acting as public adjusters on the same claim; 3) inappropriate assignment of benefit rights; and 4) excessive fees charged by public adjusters.
 - E. Discussed the draft 1033 waiver template being developed as a resource states may voluntarily use to enhance their review of 1033 waiver requests.
2. Adopted proposed amendments to the Model #228. The model is being amended to strengthen regulatory standards governing the conduct of public adjusters for the following four issues: 1) individuals acting as unlicensed public adjusters; 2) contractors who are also acting as public adjusters on the same claim; 3) inappropriate assignment of benefit rights; and 4) excessive fees charged by public adjusters.
3. Received comments on the draft 1033 waiver template, which is being developed as a template that states can voluntarily use to enhance their review of 1033 waiver requests.
4. Adopted the report of the Adjuster Licensing (D) Working Group, which met Nov. 6 and Sept. 11. During these meetings, the Working Group took the following action:
 - A. Discussed the review of Chapter 18—Adjusters of the *State Licensing Handbook*.
 - B. Discussed an adjuster licensing survey concerning the verification of designated home state data that is submitted to the State Producer Licensing Database (SPLD).
5. Adopted the report of the Producer Licensing Uniformity (D) Working Group, which met Nov. 7 and Sept. 10. During these meetings, the Working Group took the following action:
 - A. Discussed the review of the *State Licensing Handbook* and decided that 14 chapters of the handbook warrant further discussion for potential revisions.
6. Adopted the report of the Uniform Education (D) Working Group, which met Nov. 13, Oct. 29, and Oct. 9. During these meetings, the Working Group took the following action:



- A. Adopted the NAIC continuing education (CE) audit guidelines.
 - B. Discussed draft guidelines for course introduction statements.
 - C. Discussed the review and potential revisions of the *State Licensing Handbook* (Chapter 6—Prelicensing Education, Chapter 8—Testing Programs, and Chapter 14—Continuing Education).
7. Heard a report from the National Insurance Producer Registry (NIPR) Board of Directors. Through September 2024, revenue is \$61.76 million, which is 8.7% over budget. NIPR’s chief of state regulatory affairs provided an update on NIPR’s product rollouts, upcoming producer licensing zone training, and enhancements to NIPR’s State Regulatory Affairs team.