2026 Fall National Meeting
Dallas, Texas

PRODUCER LICENSING (D) TASK FORCE
Monday, November 16, 2026
8:00 – 9:00 a.m.

Meeting Summary Report

The Producer Licensing (D) Task Force met Nov. 16, 2026. During this meeting, the Task Force:

1. Adopted its Nov. 5 minutes. During this meeting, the Task Force took the following action:
   A. Adopted its Oct. 8 minutes. During this meeting, the Task Force took the following action:
      i. Adopted its Summer National Meeting minutes (*see NAIC Proceedings – Summer 2026, Producer Licensing (D) Task Force*).
      ii. Discussed proposed revisions to the *Independent Adjuster Licensing Guideline* (GL 1224).
      iii. Discussed the 1033 template survey regarding how states define the term "conviction" for the process of 1033 waiver requests.
      iv. Received an update on proposed revisions to the NAIC *State Licensing Handbook,* which were adopted by the Producer Licensing Uniformity (D) Working Group on Oct. 7.
      v. Discussed its 2027 proposed charges.
   B. Adopted its 2027 proposed charges.
   C. Adopted revisions to the *Independent Adjuster Licensing Guideline* (GL 1224).
   D. Adopted the Template for the 1033 Written Consent Process without any changes made to the definition of "conviction" since the initial adoption of the template on Aug. 12, 2025.
   E. Adopted revisions to the NAIC *State Licensing Handbook.*
   F. Discussed the Uniform Company Notice of Termination for Cause Form.

2. Discussed the Uniform Company Notice of Termination for Cause Form, which was developed to improve consistency across states; reduce administrative burdens for companies; provide states with quicker, more accurate termination notifications; and strengthen consumer protection.

3. Received a report from the National Insurance Producer Registry (NIPR) Board of Directors. NIPR reported a successful NAIC/NIPR Insurance Summit in September. It also reported that, in September, NIPR successfully launched LicenseHub, its modernized licensing website, and building on the website redesign, it also reported that it is piloting NotifyPro, a new industry-alerting product to enhance regulatory compliance. The pilot is underway, and NotifyPro is scheduled to launch officially in early 2027. NIPR reported it will finalize its 2027–2029 strategic plan in December and that it supports the electronic implementation of the Uniform Company Notice of Termination for Cause Form once it is adopted by the NAIC Membership.

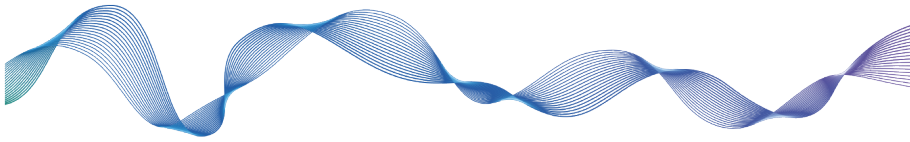
4. Adopted revisions to Appendices B and C of the Continuing Education Reciprocity (CER) Agreement.

5. Adopted the report of the Adjuster Licensing (D) Working Group, which met Sept. 12. During this meeting, the Working Group took the following action:

A. Adopted its July 15 minutes (*see NAIC Proceedings – Summer 2026, Producer Licensing (D) Task Force, Attachment Two*).
B. Received an update on the proposed revisions to the adjuster licensing guidelines, noting that the revised guidelines are at the Producer Licensing (D) Task Force for discussion.
C. Received an update from NIPR on the designated home state (DHS) application solution, including: 1) agreement by 31 of the 32 adjuster states to use the Producer Database (PDB) to determine DHS eligibility, 2) the addition of DHS information reported by Iowa, Puerto Rico, and Texas to the PDB; and 3) planned removal of nonuniform exam and continuing education (CE) location questions from the application.
D. Discussed potential 2027 priorities, including: 1) continuing education (CE) requirements for nonresident adjusters; 2) best practices for communicating with DHS adjusters; 3) transitions when a state begins licensing staff adjusters; 4) a streamlined process for modifying an adjuster's DHS; and 5) leveraging technology to reduce manual processing.
E. Discussed emergency adjuster licensing and the importance of applicant identity and residency verification.

6. Adopted the report of Producer Licensing Uniformity (D) Working Group, which met Nov. 9, Oct. 7, and Aug. 25. During these meetings, the Working Group took the following action:
   A. Adopted revisions to the following 13 chapters of the *State Licensing Handbook*: Chapters 1, 6, 8, 9, 10, 11, 12, 13, 14, 18, 19, 24, and 30. Chapter 25 required no changes, and Chapter 7 was not reviewed because its uniform application language is tied to the 1033 waiver process.
   B. Reviewed state responses to the Uniform Licensing Standards (ULS) chart. Of the 46 standards, 13 reflected 100% compliance, and six were below 80%. The standard with the lowest compliance (60%) was fingerprinting for background checks, which generally requires legislative action. The Working Group identified differing interpretations of the standards, particularly for limited lines, statewide criminal history checks, and the continuation process.
   A. Agreed on next steps for the ULS. The Working Group, with assistance from NAIC committee support, will ask states that reported noncompliance with the lowest-performing standards to confirm their responses and explain any noncompliance. The Working Group will also consider education and clarification of the standards.

7. Adopted the report of the Uniform Education (D) Working Group, which met Nov. 10 and Sept. 16. During these meetings, the Working Group took the following action:
   A. Adopted its Sept. 16 minutes. During this meeting, the Working Group took the following action:
      i. Adopted its July 8 minutes (*see NAIC Proceedings – Summer 2026, Producer Licensing (D) Task Force, Attachment Nine*).
      ii. Discussed the NAIC standardized instructor approval form.
      iii. Discussed Appendix B of the CER Agreement.
   B. Discussed the NAIC standardized instructor approval form. The Working Group reviewed the statutory background questions and identifying information, such as National Producer Number (NPN), Social Security number (SSN), and date of birth; reciprocal instructor approval; course category options; potential subject-matter expert (SME) assistance; and coordination with electronic form vendors. The Working Group will review the updated revisions during its December meeting.
   C. Adopted revisions to Appendix B and Appendix C of the CER Agreement. The Working Group provided the revisions to the Producer Licensing (D) Task Force, which are currently under review.



D. Discussed prerecorded webinars. Based on state practices and the webinar delivery guidelines, the Working Group reached consensus that a prerecorded course should be treated as self-study when the instructor does not lead a live discussion.

E. Discussed potential 2027 items of interest, including a uniform introductory statement, uniformity in reporting course approvals, the use of artificial intelligence (AI) in course content and instruction, state course audit and approval criteria, course-navigation guardrails and seat time requirements, and review of the approved and non-approved course lists.

8. Discussed the emerging use of AI to create CE courses and AI entities being licensed as business entities. The Task Force reported that these issues will be discussed in 2027.