



*2026 Spring National Meeting
San Diego, California*

PRODUCER LICENSING (D) TASK FORCE

Monday, March 23, 2026

8:00 – 9:00 a.m.

Meeting Summary Report

The Producer Licensing (D) Task Force met March 23, 2026. During this meeting, the Task Force:

1. Adopted its Feb. 25 minutes. During this meeting, the Task Force took the following action:
 - A. Discussed its 2026 priorities: review the 1033 guidelines, specifically address concerns on the definition of “conviction”; complete the review of the *State Licensing Handbook*; survey states on compliance with the NAIC uniformity and reciprocity licensing standards; evaluate the security of remote licensing exams; review the continuing education (CE) course guidelines; review the adjuster guidelines, with specific attention to the use of Designed Home State (DHS); and advance uniformity for appointment terminations for cause and state-to-state transfers.
 - B. Discussed the need for enhancements to the NAIC website for the communication and accessibility of NAIC producer licensing materials.
2. Heard a report from the National Insurance Producer Registry (NIPR) Board of Directors and an update on NIPR state support initiatives. NIPR experienced another strong and productive year in 2025 with record revenue of more than \$100.8 million, and it processed more than \$1.38 billion in state fees. NIPR reported that implementation of the NAIC Uniform Licensing Application updates approved by the Producer Licensing (D) Task Force and the Executive (EX) Committee and Plenary in 2024 will be placed in production in April. Additionally, NIPR will continue its producer licensing zone training program in 2026, with in-person training scheduled May 19–21 for the Northeast Zone in Boston, MA, and June 16–18 for the Southeast Zone in Louisville, KY.
3. Heard a presentation from the Securities and Insurance Licensing Association (SILA) on the proposed Appointment Termination for Cause Form. SILA’s goal is to work with the NAIC to: improve processes; create consistency across states; reduce administrative burdens for companies; provide states with quicker, more accurate termination notifications; and strengthen consumer protection.
4. Discussed the 1033 written consent process with a specific focus on the definition of “conviction” and the inclusion of a sealed or expunged conviction by one state and not another state.
5. Adopted the report of the Adjuster Licensing (D) Working Group, which met March 18. During this meeting, the Working Group took the following action:
 - A. Discussed modernization and streamlining of the adjuster DHS qualification as a key focus area.
 - B. Discussed that there are more than 200 state-specific non-uniform questions (NUQs) as a significant source of confusion and inefficiency, noting that many may be outdated or no longer relevant.



- C. Discussed collaboration among states to address DHS licensing concerns, including forum shopping by adjuster licensing applicants.
6. Adopted the report of the Producer Licensing Uniformity (D) Working Group, which met March 17 and Feb. 17. During these meetings, the Working Group took the following action:
 - A. Discussed its review of the *State Licensing Handbook*.
 - B. Discussed states' compliance with the NAIC Uniform Licensing Standards (ULS).
 - C. Discussed comments received on Chapter 12—Business Entities of the *State Licensing Handbook*.
7. Adopted the report of the Uniform Education (D) Working Group, which met March 11 and Feb. 24. During these meetings, the Working Group took the following action:
 - A. Discussed the Continuing Education Reciprocity (CER) Agreement and potential revisions to the agreement.
 - B. Discussed the circulation of a survey to collect information regarding which states use introductory statements for CE courses.
 - C. Received an update on the NAIC CER web page, examination pass rates, and a standardized instructor form.
8. Discussed the use of the updated NAIC Uniform Applications for adjuster licensing. There is no longer a separate Uniform Application for Adjuster Licensing.
9. Discussed producer licensing examination pass rates, which were posted to the [Uniform Education \(D\) Working Group](#) weblink.