

*2026 Summer National Meeting
Columbus, Ohio*

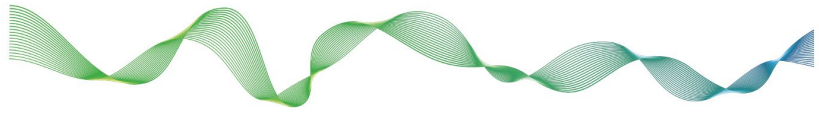
PRODUCER LICENSING (D) TASK FORCE

Wednesday, August 12, 2026
2:15 – 3:150 p.m.

Meeting Summary Report

The Producer Licensing (D) Task Force met Aug. 12, 2026. During this meeting, the Task Force:

1. Adopted its July 16 minutes. During this meeting, the Task Force took the following action:
 - A. Adopted its May 14 minutes. During this meeting, the Task Force took the following action:
 - i. Adopted its Spring National Meeting minutes (*see NAIC Proceedings – Spring 2026, Producer Licensing (D) Task Force*).
 - ii. Adopted a charge to develop a Uniform Appointment Termination for Cause Form and appointed an ad hoc subgroup to develop an initial draft.
 - iii. Discussed the 1033 template survey regarding how states define the term “conviction” for the process of 1033 waiver requests.
 - iv. Received updates from the Adjuster Licensing (D) Working Group, the Producer Licensing Uniformity (D) Working Group, and the Uniform Education (D) Working Group.
 - v. Discussed the potential reformatting of the PDF uniform producer licensing applications.
 - B. Received an update on the 1033 template survey regarding the definition of the term “conviction.”
 - C. Received an update on the Uniform Appointment Termination for Cause Form.
 - D. Received an update on remote examinations for producer licensing testing.
 - E. Received an update from National Insurance Producer Registry (NIPR) on its 2026 product road map.
 - F. Received updates from Adjuster Licensing (D) Working Group, the Producer Licensing Uniformity (D) Working Group, and the Uniform Education (D) Working Group.
2. Heard a report from the NIPR Board of Directors regarding its road map and ongoing modernization efforts. The road map update described a phased modernization strategy that includes the Sept. 12 launch of LicenseHub to provide a more consistent licensing experience and the Jan. 1 launch of NotifyPro, which will use the new enterprise data warehouse to identify producer data changes in real time. NIPR also reported that User Accounts and the LicenseHub Document Center remain under development for release in 2027.
3. Heard a presentation from the Coalition Against Insurance Fraud (Coalition) on how insurance fraud has become organized, tech-enabled, and global in nature, costing an estimated \$308.6 billion annually. The Coalition urged treating producer licensing as a fraud-prevention checkpoint through stronger identity verification, pattern monitoring, and information sharing.



4. Discussed the 1033 template survey 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. The primary purpose of the survey is to identify which types of criminal justice outcomes states include in their definition of “conviction” (e.g., sealed records, expunged convictions, pleas in abeyance, nolo contendere/no contest pleas, and diversion programs), and the rationale for their inclusion or exclusion. The Task Force has received 33 state responses.
5. Adopted the report of the Adjuster Licensing (D) Working Group, which met July 15, June 25, May 27 and April 22. During these meetings, the Working Group took the following action:
 - A. Adopted revisions to *Independent Adjuster Licensing Guideline* (GL 1224), following review of Designated Home State (DHS) standards, proposed definition revisions, stakeholder comments, and drafting notes addressing key definitions, ongoing licensure requirements, and DHS forum shopping concerns.
 - B. Discussed implementation issues and next steps regarding DHS front-end validation, NIPR solutioning, vendor coordination, business entity licensing inconsistencies, and continued jurisdiction outreach.
6. Adopted the report of Producer Licensing Uniformity (D) Working Group, which met July 21, June 16, and April 21. During these meetings, the Working Group took the following action:
 - A. Finalized its review of Chapter 12—Business Entities and Chapter 13—Temporary Licenses of the *State Licensing Handbook*.
 - B. Reviewed Chapter 19—Bail Bond Agents of the *State Licensing Handbook*.
 - C. Received updates on states’ compliance with the NAIC Uniform Licensing Standards (ULS) charts.
7. Adopted the report of the Uniform Education (D) Working Group, which met July 8, May 13, and April 15. During these meetings, the Working Group:
 - A. Adopted revisions to Appendix C of the Continuing Education Reciprocity (CER) Agreement.
 - B. Discussed the NAIC Standardized Instructor Form.
 - C. Discussed CER course difficulty levels, course approval practices, and nonresident course submissions.
 - D. Discussed Appendix B of the CER Agreement and continuing education (CE) provider application requirements.
8. Discussed the Uniform Appointment Termination for Cause Form, which is being drafted to improve consistency across states; reduce administrative burdens for companies; provide states with quicker, more accurate termination notifications; and strengthen consumer protection.
9. Received GL 1224 and announced it is seeking comments on the revised guideline until Sept. 11. The Task Force plans to consider adoption during its Oct. 15 meeting.