

NAIC BLANKS (E) WORKING GROUP

Blanks Agenda Item Submission Form

CONTACT PERSON: _____ TELEPHONE: _____ EMAIL ADDRESS: _____ ON BEHALF OF: _____ NAME: <u>Jacob W. Garn</u> TITLE: <u>Chair, Blanks Working Group</u> AFFILIATION: _____ ADDRESS: _____	DATE: <u>10/22/2021</u>	FOR NAIC USE ONLY
	Agenda Item # <u>2021-20BWG MOD</u> Year <u>2023</u> Changes to Existing Reporting <input checked="" type="checkbox"/> [X] New Reporting Requirement <input type="checkbox"/> []	REVIEWED FOR ACCOUNTING PRACTICES AND PROCEDURES IMPACT
	No Impact <input checked="" type="checkbox"/> [X] Modifies Required Disclosure <input type="checkbox"/> []	DISPOSITION
	<input type="checkbox"/> [] Rejected For Public Comment <input type="checkbox"/> [] Referred To Another NAIC Group <input type="checkbox"/> [] Received For Public Comment <input checked="" type="checkbox"/> [X] Adopted Date <u>03/29/2022</u> <input type="checkbox"/> [] Rejected Date _____ <input type="checkbox"/> [] Deferred Date _____ <input type="checkbox"/> [] Other (Specify) _____	

BLANK(S) TO WHICH PROPOSAL APPLIES

- | | | |
|---|--|---|
| <input checked="" type="checkbox"/> [X] ANNUAL STATEMENT | <input checked="" type="checkbox"/> [X] INSTRUCTIONS | <input checked="" type="checkbox"/> [X] CROSSCHECKS |
| <input type="checkbox"/> [] QUARTERLY STATEMENT | <input checked="" type="checkbox"/> [X] BLANK | |
| <input checked="" type="checkbox"/> [X] Life, Accident & Health/Fraternal | <input type="checkbox"/> [] Separate Accounts | <input type="checkbox"/> [] Title |
| <input type="checkbox"/> [] Property/Casualty | <input type="checkbox"/> [] Protected Cell | <input type="checkbox"/> [] Other _____ |
| <input type="checkbox"/> [] Health | <input type="checkbox"/> [] Health (Life Supplement) | |

Anticipated Effective Date: Annual 2023

IDENTIFICATION OF ITEM(S) TO CHANGE

Starting at Line 72 of the Life/Fraternal Five-Year Historical add or delete lines that don't pull in the specific lines of business reported on the Life/Fraternal Analysis of Operations by Lines of Business detail pages for life (individual and group, annuities (individual and group and A&H for Line 33 of those pages.

REASON, JUSTIFICATION FOR AND/OR BENEFIT OF CHANGE**

The purpose of this proposal is to bring back the line of business detail reporting of Net Gains from Operations After Dividends to Policyholders/Refunds to Members and Federal Income Taxes by Lines of Business as was done before the Life/Fraternal Analysis of Operations by Lines of Business page was expanded for the new lines of business categories.

NAIC STAFF COMMENTS

Comment on Effective Reporting Date: _____

Other Comments:

** This section must be completed on all forms.

ANNUAL STATEMENT INSTRUCTIONS – LIFE/FRATERNAL

FIVE-YEAR HISTORICAL DATA



Detail Eliminated to Conserve Space

Net Gains From Operations After Dividends to Policyholders/ Refunds to Members and Federal Income Taxes and Before Realized Capital Gains or (Losses) by Lines of Business

- Line 72 – Individual Industrial Life
All years Page 6.1, Line 33, Column 2
- Line 73 – Individual Whole Life
All years Page 6.1, Line 33, Column 3
- Line 74 – Individual Term Life
All years Page 6.1, Line 33, Column 4
- Line 75 – Individual Indexed Life
All years Page 6.1, Line 33, Column 5
- Line 76 – Individual Universal Life
All years Page 6.1, Line 33, Column 6
- Line 77 – Individual Universal Life With Secondary Guarantees
All years Page 6.1, Line 33, Column 7
- Line 78 – Individual Variable Life
All years Page 6.1, Line 33, Column 8
- Line 79 – Individual Variable Universal Life
All years Page 6.1, Line 33, Column 9
- Line 80 – Individual Credit Life
All years Page 6.1, Line 33, Column 10
- Line 81 – Individual Other Life
All years Page 6.1, Line 33, Column 11
- Line 82 – Individual YRT Mortality Risk Only
All years Page 6.1, Line 33, Column 12

<u>Line 83 – Group Whole Life</u>	
	<u>All years Page 6.2, Line 33, Column 2</u>
<u>Line 84 – Group Term Life</u>	
	<u>All years Page 6.2, Line 33, Column 3</u>
<u>Line 85 – Group Universal Life</u>	
	<u>All years Page 6.2, Line 33, Column 4</u>
<u>Line 86 – Group Variable Life</u>	
	<u>All years Page 6.2, Line 33, Column 5</u>
<u>Line 87 – Group Variable Universal Life</u>	
	<u>All years Page 6.2, Line 33, Column 6</u>
<u>Line 88 – Group Credit Life</u>	
	<u>All years Page 6.2, Line 33, Column 7</u>
<u>Line 89 – Group Other Life</u>	
	<u>All years Page 6.2, Line 33, Column 8</u>
<u>Line 90 – Group YRT Mortality Risk Only</u>	
	<u>All years Page 6.2, Line 33, Column 9</u>
<u>Line 73 – Ordinary Life</u>	
	<u>All years Page 6.1, Line 33, Column 1 less Columns 2, 10 and 12</u>
<u>Line 7491 – Ordinary Individual Deferred Fixed Annuities</u>	
	<u>All years Page 6.3, Line 33, Column 42</u>
<u>Line 92 – Individual Deferred Indexed Annuities</u>	
	<u>All years Page 6.3, Line 33, Column 3</u>
<u>Line 93 – Individual Deferred Variable Annuities With Guarantees</u>	
	<u>All years Page 6.3, Line 33, Column 4</u>
<u>Line 94 – Individual Deferred Variable Annuities Without Guarantees</u>	
	<u>All years Page 6.3, Line 33, Column 5</u>
<u>Line 95 – Individual Contingent Payout (Immediate and Annuitization)</u>	
	<u>All years Page 6.3, Line 33, Column 6</u>

Line 96 – Individual Other Annuities

All years Page 6.3, Line 33, Column 7

~~Line 75 – Ordinary – Supplementary Contracts~~

All years ~~No longer a separate column on the Analysis of Operations by Lines of Business pages. The amounts are included in the individual and group annuities amounts on Lines 74 and 78.~~

~~Line 76 – Credit Life~~

All years ~~Line 33, Page 6.1, Column 10 plus Page 6.2, Column 7~~

~~Line 77 – Group Life~~

All years ~~Page 6.2, Line 33, Column 1 less Columns 7 and 9~~

~~Line 7897 – Group Deferred Fixed Annuities~~

All years ~~Page 6.4, Line 33, Column 5~~

Line 98 – Group Deferred Indexed Annuities

All years Page 6.4, Line 33, Column 3

Line 99 – Group Deferred Variable Annuities With Guarantees

All years Page 6.4, Line 33, Column 4

Line 100 – Group Deferred Variable Annuities Without Guarantees

All years Page 6.4, Line 33, Column 5

Line 101 – Group Contingent Payout (Immediate and Annuitization)

All years Page 6.4, Line 33, Column 6

Line 102 – Group Other Annuities

All years Page 6.4, Line 33, Column 7

Line 103 – A & H – Comprehensive Group

All years Page 6.5, Line 33, Column 2

~~Line 79104 – A & H – Comprehensive Group~~

All years ~~Page 6.5, Line 33, Column 3~~

Line 105 – A & H – Medicate Supplement

All years Page 6.5, Line 33, Column 4

Line 106 – A & H – Vision Only

All years Page 6.5, Line 33, Column 5

Line 107 – A & H – Dental Only

All years Page 6.5, Line 33, Column 6

Line 108 – A & H – Federal Employees Health Benefits Plan

All years Page 6.5, Line 33, Column 7

Line 109 – A & H – Title XVII Medicare

All years Page 6.5, Line 33, Column 8

Line 110 – A & H – Title XIX Medicaid

All years Page 6.5, Line 33, Column 9

Line ~~80~~111 – A&H – Credit

All years Page 6.5, Line 33, Column 10

Line 112 – A & H – Disability Income

All years Page 6.5, Line 33, Column 11

Line 113 – A & H – Long-Term Care

All years Page 6.5, Line 33, Column 12

Line ~~81~~114 – A&H – Other Health

All years Page 6.5, Line 33, Column 13 ~~less Columns 3 and 10~~

Line ~~82~~115 – Aggregate of All Other Lines of Business

All years Page 6, Line 33, Column 8

Line ~~83~~116 – Fraternal

All years Page 6, Line 33, Column 7

ANNUAL STATEMENT BLANKS – LIFE/FRATERNAL

FIVE-YEAR HISTORICAL DATA

Show amounts in whole dollars only, no cents; show percentages to one decimal place, i.e., 17.6
 \$000 omitted for amounts of life insurance

	1 2019	2 2020	3 2021	4 2022	5 2023
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Detail Eliminated to Conserve Space

Net Gains From Operations After Dividends to Policyholders, Refunds to Members and Federal Income Taxes and Before Realized Capital Gains or (Losses) by Lines of Business (Page 6.x, Line 33)					
72. Individual industrial life (Page 6.1, Col. 2).....					
73. Individual whole life (Page 6.1, Col. 3).....					
74. Individual term life (Page 6.1, Col. 4).....					
75. Individual indexed life (Page 6.1, Col. 5).....					
76. Individual universal life (Page 6.1, Col. 6).....					
77. Individual universal life with secondary guarantees (Page 6.1, Col. 7).....					
78. Individual variable life (Page 6.1, Col. 8).....					
79. Individual variable universal life (Page 6.1, Col. 9).....					
80. Individual credit life (Page 6.1, Col. 10).....					
81. Individual other life (Page 6.1, Col. 11).....					
82. Individual YRT mortality risk only (Page 6.1, Col. 12).....					
83. Group whole life (Page 6.2, Col. 2).....					
84. Group term life (Page 6.2, Col. 3).....					
85. Group universal life (Page 6.2, Col. 4).....					
86. Group variable life (Page 6.2, Col. 5).....					
87. Group variable universal life (Page 6.2, Col. 6).....					
88. Group credit life (Page 6.2, Col. 7).....					
89. Group other life (Page 6.2, Col. 8).....					
90. Group YRT mortality risk only (Page 6.2, Col. 9).....					
73. Ordinary life (Page 6.1, Col. 1 less Cols. 2, 10 and 12).....					
7491. Ordinary individual deferred fixed annuities (Page 6.3, Col. 42).....					
92. Individual deferred indexed annuities (Page 6.3, Col. 3).....					
93. Individual deferred variable annuities with guarantees (Page 6.3, Col. 4).....					
94. Individual deferred variable annuities without guarantees (Page 6.3, Col. 5).....					
95. Individual life contingent payout (Immediate and Annuitization) (Page 6.3, Col. 6).....					
96. Individual other annuities (Page 6.3, Col. 7).....					
75. Ordinary supplementary contracts.....	XXX	XXX	XXX	XXX	XXX
76. Credit life (Page 6.1, Col. 10 plus Page 6.2, Col. 7).....					
77. Group life (Page 6.2, Col. 1 less Cols. 7 and 9).....					
7897. Group deferred fixed annuities (Page 6.4, Col. 52).....					
98. Group deferred indexed annuities (Page 6.4, Col. 3).....					
99. Group deferred variable annuities with guarantees (Page 6.4, Col. 4).....					
100. Group deferred variable annuities without guarantees (Page 6.4, Col. 5).....					
101. Group life contingent payout (Immediate and Annuitization) (Page 6.4, Col. 6).....					
102. Group other annuities (Page 6.4, Col. 7).....					
103. A & H-comprehensive individual (Page 6.5, Col. 2).....					
79104. A & H-comprehensive group (Page 6.5, Col. 3).....					
105. A & H-Medicare supplement (Page 6.5, Col. 4).....					
106. A & H-vision only (Page 6.5, Col. 5).....					
107. A & H-dental only (Page 6.5, Col. 6).....					
108. A & H-federal employees health benefits plan (Page 6.5, Col. 7).....					
109. A & H-Title XVIII Medicare (Page 6.5, Col. 8).....					
110. A & H-Title XIX Medicaid (Page 6.5, Col. 9).....					
80111. A & H-credit (Page 6.5, Col. 10).....					
112. A & H-disability income (Page 6.5, Col. 11).....					
113. A & H-long-term care (Page 6.5, Col. 12).....					
81114. A & H-other (Page 6.5, Col. 1 less Cols. 3 and 10).....					
82115. Aggregate of all other lines of business (Page 6, Col. 8).....					
83116. Fraternal (Page 6, Col. 7).....					
84117. Total (Page 6, Col. 1).....					

Detail Eliminated to Conserve Space

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