

**National Association of
Insurance Commissioners**

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Adopted by the Uniform Education (D) Working Group – Oct. 31, 2019

\$GRSWM & HE \$URGXFHU /LFHQVLQJ ' 7DVN)RUFH RQ 'HF

: KHUHD & RPKL VLRQH ULV QHVG VWKIDQW LBUFKV WLU 6WDWHV DQG LQVXUDQFH S
& (5FRXUDVSH USURFDQGH G & F HULQHQV WFRLOGMQQ LQ & HSLXFDLVG LRUQ

: KHUHDV WKH XQGHUVLJQH G , QVXUDQFH & RPPLVLRQHUV RI WKH 1\$, &
UHGXQGH DQFK IRUDWH WR SHUIRUP FRXUWHV DQVWLGXDO HYLQHZURIF W(RUV WKD
DSSURYHG E\ DQRWKHU 6WDWH

'HILQLWLRQV

+RP 6WDWH VWDWH LSURKRGH DQVWLGXDO QVXUDQFH S ULRFULSDOGSIODFHRU
SULQFLSDO SODFH RI EXVLQHVV

+RP 6WDWH \$SRURVH SURYDFR XUKD VVWDOV DWDQYLIDZK RPMDWH

5HFLSURFDV DQVWLGXDO RPKL WDWSDUQV DQVWLGXDO RPKL M&H

&RXUVH GHVLJQ

DQG LQVWUXFDWLRQDUH DUH DSSURSULDWH IRU WKH PHWKRGR

LY & UHG RWU VSHUS\ FDDQVWUXFWLRQ PHWKRGR

Y & ULWHULD IRU FRPSOHWLQJ WKH FRXUVH PHHW'G FRPDÁ DDP€`€Á•€€

BB
< 1DWLRQDO \$VVRFLDWLRQ RI , QVXUDQFH & RPPLVLRQHUV

(DFK 6WDWH DFRHSMHV IDGGZLOOXEWDQGDUYGV FRXUVH UHYLHZV

D)RU FODVVURRP DQG ZHOHLQDHGLRXEUVHOYBH\DZDPLQXWHV RI FRQWDFW

E)RU VHOI VWXG\ BQGLWZEEQOEHHVZBUIG\$GTEVDSHFQIRQHQIQHGV IRU 2QO
&RXUVHV \$SSHQGL[%

F KH PLQLPXP QXPEHU RI FUHGLWFWUWGDW ZHOXSVHVDLDDOUSHQZDVURSHQ
PD[LPXP QXPEHGUWRM FU

G &HGLWV ZLOO RQO\ EH DZDUGWGHV RU ZLFOUVEFUZHDMH WJKEKQHLFFVDPDNQ
SULQFLSOHV FRYHUDJHV HWKLFV ODZV RU UHJXODWLRQV DQG ZLOO
PRWLYDWLRQ WLP\$RQDQYJHRHQFADWVSOV B&KQURDDWQGXWHDQFHHFN
,I\ FUHGLWV DUHVDZDQGRIG RBUNEDWLQJZLWOREH RQSDWKDWFHDOUQRWDS
GRFXRHFWDWUHGWWA&RU VDOHV DQG RU PDUNHWLQJ WHQ P

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< 1DWLRQDO \$VVRFLDWLRQ RI ,QVXUDQFH &RPPLVVLRQHUV



- 1.1 ~~RSWHDQK~~ 3URH, ~~QPDWQ~~ ~~FWEURQDWBQWEGMFSURHHV~~
- 1.2 ~~RSWHDQPDWQ~~
- 1.3, ~~QKHWFWHDQKSWHFWHE3URHH~~ ~~Q~~
~~GWDKSW~~ ~~PQHEHEDQ~~ ~~HQPDUNWQWBUX~~ ~~WQWHEHV~~
~~RRQDDEWBUWQW~~ ~~Q~~
1.3.1 ~~WSSDWQPGQW~~



x (OHPHQWV LQFOXGHG LQ WKH R Q L Q M H Y L F G X U R V H I D U O O P V D B G H V G L R Q F W A R H W H
FDVH VWXG L Q G V V U B R E D W D R Q V
x , Q W H U D F W B P H Q W S S O K R E G E H E F D W F R U D F O O L O W D W G H J V W X G H Q W O H D U Q L
x 2 Q O P D Q G D W R U \ L Q W H U D F W L Y H H O B D F Q O V W L R R Q G G 8 E H F U G E O X G K R X L Q
x & D O F X O D W L R Q R I & (K R X U F U H G L W R V W K R I X O G W E H U E D W H G H R I Q O W R H Q U X V Q
x & (S U R Y L G H U V Z L O O L Q G L F D W H U X Q Q W W K H F I R W K V H L R V Q W I D G W L Y G I G H X S
D F F H V V W R W K H V W D W H I R U U H Y L H Z R I W K H F R X U V H

3URIHVVLRQDO 'HVLJQDWLRQ &RXUVH

x &RXUVH WKDW R L Q D S D U W H R F R D J Q D J W L G S D U R I R Q V L R Q D O G H V
x &UHGLW KRXUV HTXLYDOHQW WR KR X U V D H V R D J Q H G L D O R W K H V D P H F O

)LQDO \$N Q W V P

-x 7LPH VSHQW FRPSOHWLQJ WKH IL Q D E D D F X I O D W P L R Q W R V K R X F O U G H Q I R W K E R D

\$GRSWHG E\ WKH 1\$, & 0HPEHUVKLS

: ?6SULQJ ?7)?3/7)?3/: *57BR&PHQG HG *XLGH O H L Q R X U R W H V Q Q & O H D Q \$GRSWHG E\ 3/:*

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