



2024 Summer National Meeting
Chicago, Illinois

PRODUCER LICENSING (D) TASK FORCE
Tuesday, August 13, 2024
8:30–9:30 a.m.

Meeting Summary Report

The Producer Licensing (D) Task Force met Aug. 8, 2024. During this meeting, the Task Force:

1. Adopted its May 9 minutes. During this meeting, the Task Force took the following action:
 - A. Discussed the template for the 1033 waiver process
 - B. Heard reports from the Adjuster Licensing (D) Working Group, the Producer Licensing Uniformity (D) Working Group, the Public Adjuster Licensing (D) Working Group, and the Uniform Education (D) Working Group
 - C. Received comments from the American Council of Life Insurers (ACLI), Finsec, and the National Association of Insurance and Financial Advisors (NAIFA) seeking the following changes to the NAIC State Licensing Handbook: clarify prelicensing education is not required; encourage states to provide examinations in additional languages; and recognize the use of online examinations.
2. Received comments on proposed amendments to the Public Adjuster Licensing Model (PAM) (#228). The model is being amended to strengthen regulatory standards governing the conduct of public adjusters for the following four issues: 1) individuals acting as unlicensed public adjusters; 2) contractors who are also acting as public adjusters on the same claim; 3) appropriate assignment of benefit rights; and 4) excessive fees charged by public adjusters.
3. Z JÀ }uu vš• }v šZ OE L íííí Á JÀ OE š u%o š X dZ }uu vš• individuals should be required to submit a waiver request to non-resident states in which they seek to conduct the business of insurance and šZ .v]Ÿ}v }(^ }vÀ] Ÿ}vX_
4. Received comments on proposed amendments to the NAIC Uniform Producer Licensing (UPL) Model (#228). The UPL Model is being amended to strengthen regulatory standards governing the conduct of producers for the following four issues: 1) individuals acting as unlicensed producers; 2) contractors who are also acting as producers on the same claim; 3) appropriate assignment of benefit rights; and 4) excessive fees charged by producers. The Producer Licensing Uniformity (D) Working Group adopted
5. Adopted the report of the Adjuster Licensing (D) Working Group, which was adopted on June 12 and May 15.
 - A. Discussed the review of the State Licensing Handbook (SLH) and the Business Entity (Initial and Renewal).
 - B. Discussed the review of the State Licensing Handbook (SLH) and distributed a checklist listing each chapter

