

## **Assessment information for Insurers**

### **Administrative Account Assessments**

- The Fund generally levies administrative assessments **every other year in the odd numbered years**. You can expect the **next administrative assessment** in the **first quarter of 2019**.

### **Insolvency Account Assessments**

#### **Property Casualty (Other Insurance) Account**

- There are currently no plans to make an assessment in 2017.
- Authorized, but uncalled Assessments Pending
  - None

#### **Life Account**

- There are currently no plans to make an assessment in 2017.
- Authorized, but uncalled Assessments Pending
  - None

#### **Annuity Account**

- There are currently no plans to make an assessment in 2017.
- Authorized, but uncalled Assessments Pending
  - None

#### **Disability (includes Health) Account**

- There are currently no plans to make an assessment in 2017.
- Authorized, but uncalled Assessments Pending
  - None
- The Fund will be assessing for Penn Treaty as needed based on claims activity. We project the next assessment will take place in 2020.

#### **HMO Account**

- There are currently no plans to make an assessment in 2017
- Authorized, but uncalled Assessments Pending
  - None

### **Assessment Premium Reporting and Exemption Claims**

- Insurers writing life, annuity, accident and health or HMO coverage should utilize the NOLHGA Assessment Data Survey reconciliation with the annual financial statement to report exempt premium (i.e. Medicare and Medicaid).

- Insurers writing property casualty or other covered lines of business who have exempt premium that appears on their annual financial statement should contact the Fund for instructions on how to file for a premium exemption.

### **Guidance for Statutory Reserving**

- Each December, the Fund produces a summary of projected liabilities and account balances by insolvency account to assist companies in their statutory accounting reserve determinations.
- If you would like to be added to the distribution list for this report, please send your contact information to [Wisconsin@wisf-madison.org](mailto:Wisconsin@wisf-madison.org)