

WFG Informational Bulletin

To: All New York Policy Issuing Agents of WFG National Title Insurance Company
From: WFG Underwriting Department
Date: March 19, 2019
Bulletin No: NY 2019-07
Subject: Title Insurance Rate Service Association, Inc. Data Call 2018

The New York State Department of Financial Services (DFS) has directed all underwriters, including WFG National Title Insurance Company to collect information on income and expense data for 2018 for each of their appointed independent licensed title agents operating in New York State. The DFS has directed that the information contained in Schedule U-4 **must** be collected from every licensed independent agent for the period of January 1, 2018 through December 31, 2018. If you represent multiple underwriters you will receive a similar request to complete the Schedule U-4 for each of your underwriters.

The DFS has imposed a strict deadline for submission of the data call by Friday, May 3, 2019.

We have attached the instructions and the Schedule U-4 for every agent to complete. As per the instructions from Milliman, the statistical consultant to TIRSA, the data call contains three parts. Each agent who has done business with WFG in New York in 2018 is expected to complete all three parts and return them to WFG by the May 3rd deadline. The company will then review and compile the results to submit to Milliman. TIRSA will be required to submit the information to The DFS. Please be advised that TIRSA has notified us that failure to comply with the 2018 data call will result in notification to the Superintendent of Financial Services.

Please refer to the attached instructions in completing the U-4 Schedule.

Click [HERE](#) to download the U-4 Instructions.

Click [HERE](#) to download the U-4 Schedule.

The completed schedule must be submitted to:

John Wooldridge jwooldridge@Willistonfinancial.com with a copy to Krisha Nyborg
Knyborg@wfgnationaltitle.com

Information Bulletins are designed to provide our agents with information we think will help in managing their business or just being better title professionals, but which does not rise to the level of being an underwriting mandate and are not within the scope of the agency agreement.