



To: All New York Policy Issuing Agents of WFG National Title Insurance Company
From: WFG Underwriting Department
Date: April 6, 2020
Bulletin No.: NY 2020-12
Subject: Title Insurance Rate Service Organization, Inc. Data Call 2019

The New York State Department of Financial Services (DFS) has required all title insurance underwriters operating in the State of New York to collect information on income and expense data for 2019 from each of their appointed independent and affiliated licensed title agents. Consistent with last year's Data Call, the 2019 Data Call consists of three parts which you will find as tabs on Schedule U-4. Please note, based on the feedback last year, the expense categories have been expanded.

Each agent who has done business with WFG National Title Insurance Company in New York in 2019 is expected to complete all three parts of Schedule U-4 by June 12, 2020. If you write for more than one underwriter, you must complete each Part for each of your underwriters and return the completed Schedule U-4 to the respective underwriter. Please be sure to refer to the Instructions for completion.

In addition, TIRSA released recorded training sessions as to how to complete the different parts of Schedule U-4 and are available to you on the NYSLTA website.

[Click here to download the Schedule U-4 Instructions](#)

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Here is a list of the TIRSA recorded training sessions:

[Part 1- TIRSA - 2019 Independent Agent Call Instructions](#)

[Part 2- TIRSA - 2019 Independent Agent Call Instructions](#)

[Part 3- TIRSA - 2019 Independent Agent Call Instructions](#)

[Part 4- TIRSA - 2019 Independent Agent Call Instructions](#)

Please send the completed Schedule U-4 to:
John Wooldridge JWooldridge@Willistonfinancial.com with a copy to Julie Curlen
JCurlen@wfgnationaltitleinsurance.com

Thank you for your anticipated cooperation.

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.