



To: All New York Policy Issuing Agents of WFG National Title Insurance Company  
From: WFG Underwriting Department  
Date: April 2, 2021  
Bulletin No.: NY 2021-12  
Subject: Title Insurance Rate Service Organization, Inc. 2020 Data Call

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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 2020 from each of their appointed independent and affiliated licensed title agents. Consistent with last year's Data Call, the 2020 Data Call consists of three parts on Schedule U-4. Agents are expected to complete all three parts and return them to their respective Underwriter(s) no later than **May 26, 2021**. A Consistency Check tab has been added to the Schedule U-4 spreadsheet to assist in reconciling the three parts. Please note, there have been some changes to the expense categories including an additional section added to Part 3 requesting your top 5 salaries relating to Title insurance. Please be sure to refer to the Instructions for completion. WFG will be hosting a webinar on April 22, 2021 to assist you, addressing the particulars of the Data Call and will be available for questions. Details to follow.

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

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Please send the completed Schedule U-4 to:  
John Wooldridge [JWooldridge@Willistonfinancial.com](mailto:JWooldridge@Willistonfinancial.com) with a copy to Brandy Gary  
[BGary@willistonfinancial.com](mailto:BGary@willistonfinancial.com) and Julie Curlen [JCurlen@wfgnationaltitleinsurance.com](mailto: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.*