



To: All New York Policy Issuing Agents of WFG National Title Insurance Company
From: WFG New York Underwriting Department
Date: January 7, 2022
Bulletin No: NY 2022-01
Subject: Title Insurance Rate Service Organization, Inc. 2021 Data Call

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 2021 from each of their appointed independent and affiliated licensed title agents.

Milliman, Inc. is the Statistical Consultant for TIRSA for the 2021 Data Call. Please see the links below for the instructions and Excel file for the agent Data Call submission.

Please note, that the 2021 agent Data Call contains four parts. The prior Part 3 has been moved to Part 4, and a new Part 3 added with Parts 1 and 2. The new Part 3 requests additional information for Third Party Production Costs included in Part 1. Agents are expected to complete all four parts and return to their Underwriter(s) no later than March 11, 2022. Please be sure to refer to the Instructions for completion.

Please NOTE, all reporting should be done as if the Reporting entity was a cash basis taxpayer. Only include revenue from transactions closed in 2021 and expenses actually paid in 2021. If you would like the revenue information you reported to WFG in 2021 with corresponding item counts, for Zone 1 and Zone 2, please contact Julie Curlen at jcurlen@wfgtitle.com.

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

[Click here to download Schedule U-4 Excel file](#)

Please email your completed Agent Call 2021 excel file to:
financialreporting@willistonfinancial.com and
jcurlen@wfgtitle.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.