



To: All New York Policy Issuing Agents of WFG National Title Insurance Company
From: WFG Underwriting Department
Date: January 12, 2023
Bulletin No.: NY 2023-02
Subject: Title Insurance Rate Service Association, Inc. 2022 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 2022 from each of their appointed independent and affiliated licensed title agents.

Milliman, Inc. is the Statistical Consultant for TIRSA for the 2022 Data Call. Please see the links below for the instructions and Excel file for the agent Data Call submission.

There are a few changes from the prior year's Data Call. The 2022 agent Data Call consists of three schedules (instead of four as in the prior year's submission) and one reconciliation sheet. Agents are expected to complete all three parts and return to their Underwriter(s) no later than **March 10, 2023**. Please 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 2022 and expenses actually paid in 2022. If you would like the revenue information you reported to WFG in 2022 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 2022 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.