



To: All New York Policy Issuing Agents of WFG National Title Insurance Company  
From: WFG Underwriting Department  
Date: February 5, 2024  
Bulletin No.: NY 2024-03  
Subject: Title Insurance Rate Service Association, Inc. 2023 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 2023 from each of their appointed independent and affiliated licensed title agents.

Milliman, Inc. is the Statistical Consultant for TIRSA for the 2023 Data Call. Please see the links below for the instructions and Excel file for the agent Data Call submission.

There have been no changes from the prior year's Data Call. The 2023 agent Data Call consists of three schedules and one reconciliation sheet. Agents are expected to complete all three parts and return to their Underwriter(s) no later than **March 18, 2024**. 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 2023 and expenses actually paid in 2023. If you would like the revenue information you reported to WFG in 2023 with corresponding item counts, for Zone 1 and Zone 2, please contact Krisha Nyborg at [knyborg@wfgtitle.com](mailto:knyborg@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 2023 excel file to:  
[financialreporting@willistonfinancial.com](mailto:financialreporting@willistonfinancial.com) and [knyborg@wfgtitle.com](mailto:knyborg@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.*