



Monica J. Lindeen

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Bulk Assumption Transfer

Montana Code Annotated §[33-2-1206](#) requires that the Commissioner review and approve (in writing) all agreements of bulk reinsurance.

In order for the department to consider approving the agreement, please provide the following items:

1. A copy of the executed assumption reinsurance agreement.
2. Copies of the regulatory approvals of the assumption *transaction*, issued by the insurance department(s) of the domiciliary state(s) involved.
3. A list of the policy forms numbers affected by the transaction, along with a listing of the names and policy numbers of each Montana resident policy owner.

Upon review of these requested items, with no exception noted, this department will issue a written approval of the assumption reinsurance transaction.