

2023 *&* Beyond

STRATEGIC ROADMAP OVERVIEW



LEGISLATIVE EFFECTIVENESS

Build and execute a successful government relations strategy to protect consumers and foster a strong insurance and securities marketplace for Montanans through fair and efficient regulation.

- Work with legislators on their priorities to help protect consumers of securities and insurance
- Promote CSI 2023 legislative agenda
- Implement 2023 legislation impacting the CSI and conduct agency and stakeholder education



EXPANDED OUTREACH

Deliver meaningful communication to educate, inform, and empower consumers and industry.

- Enhance agency's digital presence and information accessibility
- Deliver relevant consumer-focused training and education
- Promote Montana as the premier domicile for captive insurance
- Promote State Trust Land stakeholder engagement



LEGAL PROSECUTION & ENFORCEMENT

Ensure adherence to state laws and regulations, hold bad actors accountable, and advocate victim justice.

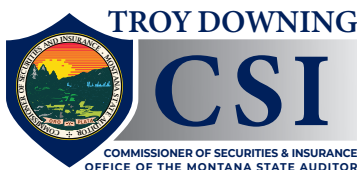
- Maintain CSI as Montana's leader in white collar crime investigation and enforcement
- Dedicate resources to handling enforcement actions and prosecutions in-house
- Support and promote CSI Financial Abuse Specialist Team (FAST) to protect seniors



INTRA-AGENCY EFFICIENCY OPERATIONS | REGULATION & COMPLIANCE

Promote effective, efficient, and transparent management and stewardship of state resources.

- Assess agency desk-level policies and procedures and update as needed
- Encourage and support process improvement opportunities
- Expand market conduct oversight
- Build and foster agency talent management



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