



TO: Eligible Foreign Surplus Lines Insurers

FROM: Examinations Bureau

SUBJECT: Continuation of Eligibility in Montana

To remain an eligible surplus lines insurer in the state of Montana, the following items must be submitted annually, by April 1:

An Annual Premium by Producer Report for the previous calendar year, in an Excel spreadsheet format. Please ensure that premium information conforms with Schedule T of your annual financial statement. The following items should be included in the report:

- Policyholder Name
- Policyholder Address
- Policy Number
- Insurance Agency
- Individual Agent
- Premium Amount
- Effective Date of Policy

The above items should be submitted electronically by emailing CSIExams@mt.gov. If the report is too large to submit by email, it may be sent through the Montana File Transfer Service (FTS). FTS instructions are found at <https://transfer.mt.gov/Home/Instructions>. When using the FTS, please select Tavin Mogus (tmogus@mt.gov) as the recipient.

NEW: The Montana Medical Malpractice Professional Liability Experience Report is no longer required.

If you have any questions, please contact the Examinations Bureau at CSIExams@mt.gov or (406) 444-2040.



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