



To be filed by: 1) Texas domestic insurance companies that have qualified pension plan contracts, or 2) foreign insurance companies that have qualified pension plan contracts and the Texas Department of Insurance initiated an examination in the filing year. OTHERWISE, DO NOT FILE THIS FORM

Exemption § 401.151(d)(1)(A) of the Texas Insurance Code allows for a partial exemption from the Texas examination overhead assessment for admitted assets and annual premium receipts that are attributable to qualified pension plan contracts as defined in Section 818(a) of the Internal Revenue Code of 1986 (26 U.S.C. Sec. 818(a)). To claim the exemption, domestic insurance companies and applicable foreign insurance companies must provide information for their qualified pension plan contracts by completing the exemption form below.

Qualified Pension Plan Contracts

Admitted Assets* Premium and Contract Considerations*

* not to exceed qualifying reserves

Company Name

Address

City State Zip Code

Contact Person Phone Number

FEI Number NAIC Number TDI Number

Affidavit (Must be signed by two principal officers of the Company)

Signature Title

Signature Title

The State of §

County of §

Before me, a notary public in and for the State of

on this day personally appeared, known to me

Printed names of signing individuals

or through

[or proved to me on the oath of]

Printed name of witness known to notary public

Description of identity card or other document

to be the person whose name is subscribed to the foregoing instrument, and acknowledged to me that (s)he executed the same for the purposes and consideration therein expressed.

Given under my hand and seal of office this day of, A.D.,

Notary Public

In and for (County and State)