



OKLAHOMA INSURANCE DEPARTMENT

BULLETIN NO.: LH 2014-02

TO: All Life, Accident and Health Insurance Companies
All Producers with Life/Health Line of Authority

RE: Policyholder Information Requests

FROM: Mike Rhoads, Deputy Commissioner

DATE: July 15, 2014

This Bulletin updates information originally provided in LH 2011-04, regarding the requirements of 36 O.S. § 1435.41. That statute, which previously required an insurer to recognize a policyholder's request to have information regarding a life insurance policy provided to the producer that originally wrote the coverage, has been amended and broadened. The statute now applies to health, as well as life, insurance. In addition, the statute has been amended to require the carrier to honor the request even if a new agent of record has been appointed. [[36 O.S. § 1435.41](#)]

The law still requires the Oklahoma Insurance Department to prescribe a form that can be used to make such a request. The previous form, which had been promulgated through rulemaking, has been repealed. A new form is attached to this Bulletin [[Policy Holder Information Release Form](#)]. A policyowner may use this, or a substantially similar form. Insurers are required to recognize any form that complies with the statute's requirements.

Questions or comments applicable to this bulletin should be directed to Mike Rhoads (Mike.Rhoads@oid.ok.gov) or Susan Dobbins (Susan.Dobbins@oid.ok.gov), Oklahoma Insurance Department, Five Corporate Plaza, 3625 NW 56th, Suite 100, Oklahoma City, OK 73112.

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