



**OKLAHOMA INSURANCE DEPARTMENT**  
STATE OF OKLAHOMA

**BULLETIN NO. LH 2011-04**

**TO:** Insurers Authorized to Write Life Insurance  
**RE:** Providing Insurance Policy Information  
**FROM:** Denise Engle, Deputy Commissioner of Workers Compensation  
Rate and Form Compliance, Licensing and Continuing Education  
**DATE:** August 9, 2011

In 2010, the Oklahoma legislature enacted 36 O.S. § 1435.41. This section provides that:

“An insurer shall provide to any insurance producer authorized to sell life insurance products, whose appointment has been terminated for any reason other than the reasons set forth in 36 O.S. § 1435.13 and is still the agent of record or servicing agent and has not been replaced by another servicing agent upon termination, information relating to the policy of the person who purchased a product from such producer if the insured has signed a form authorizing the release of the information.”

There is an exception to this requirement: the law does not apply to any policy sold or serviced by an insurance producer while associated with an insurer’s captive distribution system.

The law also requires the Insurance Commissioner to prescribe the form required above. It is the intent of the Oklahoma Insurance Department to address this requirement with a permanent rule during the next rulemaking cycle. In answer to inquiries that the Oklahoma Insurance Department has received regarding compliance with the law in the interim until rules are promulgated, the Department is releasing the attached document as an example of an acceptable release document. Insurers receiving this form, or a substantially similar form, are expected to comply with the requirements of this statute.

**Questions or comments applicable to this bulletin should be directed to Denise Engle ([Denise.Engle@oid.ok.gov](mailto:Denise.Engle@oid.ok.gov)) or Susan Dobbins ([Susan.Dobbins@oid.ok.gov](mailto:Susan.Dobbins@oid.ok.gov)), Oklahoma Insurance Department, Five Corporate Plaza, 3625 NW 56<sup>th</sup>, Suite 100, Oklahoma City, OK 73112.**

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