

OKLAHOMA INSURANCE DEPARTMENT

FIVE CORPORATE PLAZA
3625 NW 56TH, SUITE 100
OKLAHOMA CITY, OK 73112
WWW.OID.OK.GOV



COMPTROLLER DIVISION
PHONE: 405.521.6656
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GLEN MULREADY
INSURANCE COMMISSIONER

FAQ: SURPLUS LINES ANNUAL REPORTS

Effective with 2016 Surplus Lines Annual Statement due in 2017, all Surplus Lines Annual Statements will be filed by electronic format through OPTins pursuant to Order No. 16-353-PRJ.

NO PAYMENTS DUE WITH THIS REPORT. Due by April 1.

Required for each licensed surplus lines entity, whether you do or do not have business for the prior year. Use same name and license number on both forms. Either broker name and license number of agency name and license number. Must submit one separate report for each licensed entity such as licensed broker and licensed agency.

Broker/Agency Annual Statement (Page 1)	Affidavit must be original and be notarized or may be submitted electronically through OPTins with an electronic signature.	
Annual Surplus Tax Return (Page 2)	Spreadsheet can be completed quarterly. 1st Quarter enter in March; 2nd Quarter enter in June, 3rd Quarter enter in September, 4th Quarter enter in December.	
REQUIRED FIELD	Gross Amount of Premium	Premium with fees included
REQUIRED FIELD	Aggregate Gross Premium Charged	Premium with fees included (same as column 1)
	Aggregate Return of Premium	Gross Credits or Premium returned such as cancelled policies
REQUIRED FIELD	Aggregate Net Premium	Total Debits minus Total Credits (column 2 minus column 3)
REQUIRED FIELD	Totals	

For questions on the required information above, contact the Oklahoma Insurance Department:

Sarah.McCubbin@oid.ok.gov, or call (405) 522-0473

JeanAnn.Parsley@oid.ok.gov, or call (405) 521-3967

For questions on entering, amending, or submitting the reports electronically, contact OPTins:

OPTinshelp@naic.org, or call (816) 783-8990