

FAQ: SURPLUS LINES ANNUAL REPORTS:

Effective with 2016 Surplus Lines Annual Statement due in 2017, All Surplus Lines Annual Statement 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 & license number on both forms. Either broker name & license number or agency name & license number. Must submit one report for each licensed entity such as broker and agency licensed as surplus lines.

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. 1 st Quarter enter in March, 2 nd Quarter enter in June, 3 rd Quarter enter in September, 4 th 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 any questions for the required information above you can contact the Melanie Paxton at Oklahoma Insurance Department at (405)521-6649 or Melanie.Paxton@oid.ok.gov .

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For any questions for submitting the reports electronically please contact OPTins at (816)783-8990. This included entering or amending the forms.