

Life Settlement Provider Data Report

Instructions

- Each provider must submit an annual report, whether any reportable transactions occurred.
- Report transactions based on insureds who are Texas residents.
- Prior to submission you may save a copy for your records. This annual report is due by March 1st. Refer to [Texas Insurance Code Section 1111A.006](#).
- Do not submit a hard copy in the mail. Send the completed form by email to lifehealth@tdi.texas.gov.

Note: You will not receive a confirmation email.

Reporting year _____

Provider information

TDI license number _____

Provider name _____

Address _____

City _____ State _____ ZIP _____

Contact information

Contact name _____

Email _____

Phone number _____

Check this box if no reportable transactions occurred during the applicable reporting periods.

[28 Texas Administration Code Section 3.1760\(b\)\(3\)\(A\)-\(C\)](#)

Policy issue year	Total number of life settlement contracts entered	Aggregate face amount of policies settled	Proceeds of life settlement contracts entered
2022			
2023			
2024			
2025			
2026			

28 Texas Administration Code Section 3.1760(3)(D)

Full name of each insurance company whose policies have been settled	Full name of each broker that settled the policies

28 Texas Administration Code Section 3.1760(3)(E)

Name of life settlement broker who estimated life expectancies for a life settlement contract	Life settlement broker's TDI license number