

Payment to Agency Report

A Public Document

PAYMENT TO AGENCY REPORT

1. Agency Name		Date Stamp	California 801 Form For Official Use Only
Division, Department, or Region (if applicable)			
Street Address			
Area Code/Phone Number	Email	<input type="checkbox"/> Amendment (explain in comment section)	
Agency Contact (name and title)		Date of Original Filing: _____ (month, day, year)	

2. Donor Name and Address

Individual _____ Last Name First Name Other _____ Name

Address _____ City _____ State _____ Zip Code _____

If "Other" is marked, describe the entity's business activity (if business) or its nature and interests.

➔ If applicable, identify the name of each source and the amount(s) received by the donor for this payment:

_____ \$ _____ Name _____ \$ _____ Amount

3. Payment Information (Complete Sections 3.1 (a or b), 3.2, 3.3)

3.1 (a) Travel Payment

_____ Location of Travel _____ Dates (month, day, year) _____

_____ Rail Air Bus Auto Other _____
 Transportation Provider Check Applicable Boxes Name of Lodging Facility

\$ _____ \$ _____ \$ _____ \$ _____ \$ _____
 Lodging Expenses Meal Expenses Transportation Expenses Other Expenses Total Expenses

3.1 (b) Payment(s) not related to travel:

_____ \$ _____
Dates (month, day, year) Total Expenses

3.2. Payment Description. Provide a specific description of the payment and its agency purpose and use.

3.3. Identify the officials who used the payment in Section 3.1 (See instructions)

_____ Last Name First Name _____ Position/Title _____ Department/Division _____

_____ Last Name First Name _____ Position/Title _____ Department/Division _____

4. Verification

I authorized the acceptance of the reported payment(s) as in compliance with FPPC regulations.

_____ Signature _____ Print Name _____ Title _____ (month, day, year)

Comment:
(Use this space or an attachment for any additional information)

California Form 801 - #1

The National Association of Insurance Commissioners (NAIC) is a 501(c)(3) organization which serves as the U.S. standard-setting and regulatory support organization created and governed by the chief insurance regulators from the 50 states, the District of Columbia and five U.S. territories. Through the NAIC, state insurance regulators establish standards and best practices, conduct peer review, and coordinate their regulatory oversight. NAIC staff supports these efforts and represents the collective views of state regulators domestically and internationally. NAIC members, together with the central resources of the NAIC, form the national system of state-based insurance regulation in the U.S.

California, as the largest insurance market in the nation, plays a significant role in helping shape NAIC model laws and regulatory policy. Doing so involves active participation in NAIC National Meetings and conference calls with regulators from other states. In 2024, California serves as Chair, Vice Chair and/or Member on approximately 73 out of the 118 NAIC Committees, Task Forces and Working Groups, and actively monitors approximately 18 other bodies.

National Association of Insurance Commissioners (NAIC) Meeting Payment Information

Entry Number: 1

Meeting or Event Name/Location: 2024 NAIC Western Zone Meeting, Vancouver, WA

Travel Dates: 10/03/24-10/06/24

Official's Title, Department/Division: Deputy Commissioner, Climate and Sustainability

Transportation Provider: N/A

Airfare: N/A

Lodging: \$ 639.33

Meals: \$ 135.00

Other Expenses: N/A

Total Expenses: \$ 774.33

Entry Number: 2

Meeting or Event Name/Location: Western Zone Market Conduct Training, Salt Lake City, UT

Travel Dates: 10/27/24-10/30/24

Official's Title, Department/Division: Associate Insurance Rate Analyst

Market Conduct Division - Field Rating & Underwriting Bureau, Consumer Services & Market Conduct Branch

Transportation Provider: Southwest Airlines

Airfare: \$ 276.50

Lodging: \$ 656.70

Meals: \$ 236.00

Other Expenses: \$146.77

Total Expenses: \$ 1,315.97

Entry Number: 3

Meeting or Event Name/Location: Western Zone Market Conduct Training, Salt Lake City, UT

Travel Dates: 10/27/24-10/30/24

Official's Title, Department/Division: Associate Insurance Compliance Officer, Market Conduct Division - Field Rating & Underwriting Bureau, Consumer Services & Market Conduct Branch

Transportation Provider: Southwest Airlines

Airfare: \$ 308.32

Lodging: \$ 656.70

Meals: \$ 240.00

Other Expenses: \$ 266.47

Total Expenses: \$ 1,471.49

Entry Number: 4

Meeting or Event Name/Location: 2024 InsurTech, Omaha, NE

Travel Dates: 10/28/24-10/30/24

Official's Title, Department/Division: Attorney IV, Government Law Bureau, Legal

Transportation Provider: Southwest Airlines

Airfare: \$ 369.13

Lodging: \$ 375.80

Meals: \$ 177.00

Other Expenses: \$ 74.00
Total Expenses: \$ 995.93

Entry Number: 5
Meeting or Event Name/Location: 2024 NAIC Fall National Meeting, Denver, CO
Travel Dates: 11/16/24-11/19/24
Official's Title, Department/Division: Associate Governmental Program Analyst, Office of the Special Counsel
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 86.00
Other Expenses: N/A
Total Expenses: \$ 86.00

Entry Number: 6
Meeting or Event Name/Location: 2024 NAIC Fall National Meeting, Denver, CO
Travel Dates: 11/14/24-11/18/24
Official's Title, Department/Division: Chief Actuary, Life Actuarial Office, Financial Surveillance Branch
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 140.00
Other Expenses: N/A
Total Expenses: \$ 140.00

Entry Number: 7
Meeting or Event Name/Location: 2024 NAIC Fall National Meeting, Denver, CO
Travel Dates: 11/17/24-11/19/24
Official's Title, Department/Division: Chief, Office of Insurance Diversity and Innovation
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 117.00
Other Expenses: N/A
Total Expenses: \$ 117.00

Entry Number: 8
Meeting or Event Name/Location: 2024 NAIC Fall National Meeting, Denver, CO
Travel Dates: 11/16/24-11/19/24
Official's Title, Department/Division: Division Chief, Licensing Services Division
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 124.00

Other Expenses: N/A
Total Expenses: \$ 124.00

Entry Number: 9
Meeting or Event Name/Location: 2024 NAIC Fall National Meeting, Denver, CO
Travel Dates: 11/16/24-11/20/24
Official's Title, Department/Division: Attorney IV, Government Law Bureau, Legal
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 105.00
Other Expenses: N/A
Total Expenses: \$ 105.00

Entry Number: 10
Meeting or Event Name/Location: 2024 NAIC Fall National Meeting, Denver, CO
Travel Dates: 11/15/24-11/18/24
Official's Title, Department/Division: Deputy Commissioner, Community Relations and
Outreach Branch
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 105.00
Other Expenses: N/A
Total Expenses: \$ 105.00

Entry Number: 11
Meeting or Event Name/Location: 2024 NAIC Fall National Meeting, Denver, CO
Travel Dates: 11/15/24-11/19/24
Official's Title, Department/Division: Staff Services Manager II, Office of the Special Counsel
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 86.00
Other Expenses: N/A
Total Expenses: \$ 86.00

Entry Number: 12
Meeting or Event Name/Location: 2024 NAIC Fall National Meeting, Denver, CO
Travel Dates: 11/16/24-11/19/24
Official's Title, Department/Division: Deputy Commissioner, Rate Regulation Branch
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 105.00
Other Expenses: N/A

Total Expenses: \$ 105.00

Entry Number: 13

Meeting or Event Name/Location: 2024 NAIC Fall National Meeting, Denver, CO

Travel Dates: 11/15/24-11/20/24

Official's Title, Department/Division: Supervising Insurance Examiner, Financial Surveillance Branch

Transportation Provider: N/A

Airfare: N/A

Lodging: N/A

Meals: \$ 140.00

Other Expenses: N/A

Total Expenses: \$ 140.00

Entry Number: 14

Meeting or Event Name/Location: 2024 NAIC Fall National Meeting, Denver, CO

Travel Dates: 11/18/24-11/19/24

Official's Title, Department/Division: Assistant Chief, Community Relations & Outreach

Transportation Provider: N/A

Airfare: N/A

Lodging: N/A

Meals: \$ 16.00

Other Expenses: N/A

Total Expenses: \$ 16.00

Entry Number: 15

Meeting or Event Name/Location: 2024 NAIC Fall National Meeting, Denver, CO

Travel Dates: 11/16/24-11/19/24

Official's Title, Department/Division: Division Chief, Consumer Services Division, Consumer Services & Market Conduct Branch

Transportation Provider: N/A

Airfare: N/A

Lodging: N/A

Meals: \$ 105.00

Other Expenses: N/A

Total Expenses: \$ 105.00

Entry Number: 16

Meeting or Event Name/Location: 2024 NAIC Fall National Meeting, Denver, CO

Travel Dates: 11/17/24-11/19/24

Official's Title, Department/Division: Deputy Commissioner & Special Counsel, Office of the Special Counsel

Transportation Provider: N/A

Airfare: N/A

Lodging: N/A

Meals: \$ 70.00

Other Expenses: N/A
Total Expenses: \$ 70.00

Entry Number: 17
Meeting or Event Name/Location: 2024 NAIC Fall National Meeting, Denver, CO
Travel Dates: 11/16/24-11/19/24
Official's Title, Department/Division: Deputy Commissioner, Communications and Press Relations Branch
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 105.00
Other Expenses: N/A
Total Expenses: \$ 105.00

Entry Number: 18
Meeting or Event Name/Location: 2024 NAIC Fall National Meeting, Denver, CO
Travel Dates: 11/15/24-11/20/24
Official's Title, Department/Division: Division Chief, Financial Analysis Division, Financial Surveillance Branch
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 140.00
Other Expenses: N/A
Total Expenses: \$ 140.00

Entry Number: 19
Meeting or Event Name/Location: 2024 NAIC Fall National Meeting, Denver, CO
Travel Dates: 11/14/24-11/19/24
Official's Title, Department/Division: Actuary Supervisor, Rate Regulation Branch
Transportation Provider /A
Airfare: N/A
Lodging: N/A
Meals: \$ 105.00
Other Expenses: N/A
Total Expenses: \$ 105.00

Entry Number: 20
Meeting or Event Name/Location: 2024 NAIC Fall National Meeting, Denver, CO
Travel Dates: 11/17/24-11/20/24
Official's Title, Department/Division: Deputy Commissioner, Climate and Sustainability
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 70.00

Other Expenses: N/A
Total Expenses: \$ 70.00

Entry Number: 21
Meeting or Event Name/Location: 2024 NAIC Fall National Meeting, Denver, CO
Travel Dates: 11/17/24-11/20/24
Official's Title, Department/Division: Assistant Chief Counsel, Health Equity and Access Office
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 70.00
Other Expenses: N/A
Total Expenses: \$ 70.00

Entry Number: 22
Meeting or Event Name/Location: 2024 NAIC Fall National Meeting, Denver, CO
Travel Dates: 11/14/24-11/18/24
Official's Title, Department/Division: Chief Systems Actuary
Office of Principle Based Reserving, Financial Surveillance Branch
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 105.00
Other Expenses: N/A
Total Expenses: \$ 105.00

Entry Number: 23
Meeting or Event Name/Location: 2024 New Financial Regulator Training, Kansas City, MO
Travel Dates: 12/9/24-12/12/24
Official's Title, Department/Division: Insurance Examiner Field Examination Division – Los Angeles, Field Examination Bureau I, Financial Surveillance Branch
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 70.00
Other Expenses: N/A
Total Expenses: \$ 70.00

Entry Number: 24
Meeting or Event Name/Location: 2024 New Financial Regulator Training, Kansas City, MO
Travel Dates: 12/9/24-12/12/24
Official's Title, Department/Division: Insurance Examiner, Financial Analysis Division - Financial Analysis Bureau II, Financial Surveillance Branch
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A

Meals: \$ 70.00
Other Expenses: N/A
Total Expenses: \$ 70.00

Entry Number: 25
Meeting or Event Name/Location: 2024 New Financial Regulator Training, Kansas City, MO
Travel Dates: 12/9/24-12/12/24
Official's Title, Department/Division: Insurance Examiner, Field Examination Division – Los Angeles, Field Examination Bureau II, Financial Surveillance Branch
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 70.00
Other Expenses: N/A
Total Expenses: \$ 70.00

Entry Number: 26
Meeting or Event Name/Location: 2024 New Financial Regulator Training, Kansas City, MO
Travel Dates: 12/9/24-12/12/24
Official's Title, Department/Division: Insurance Examiner, Field Examination Division – Los Angeles, Field Examination Bureau II, Financial Surveillance Branch
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 70.00
Other Expenses: N/A
Total Expenses: \$ 70.00

Entry Number: 27
Meeting or Event Name/Location: 2024 New Financial Regulator Training, Kansas City, MO
Travel Dates: 12/9/24-12/12/24
Official's Title, Department/Division: Insurance Examiner, Financial Analysis Division - Financial Analysis Bureau II, Financial Surveillance Branch
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 70.00
Other Expenses: N/A
Total Expenses: \$ 70.00

Entry Number: 28
Meeting or Event Name/Location: Insurance Summit, Kansas City, MO
Travel Dates: 9/15/24-9/19/24
Official's Title, Department/Division: Deputy Commissioner, Rate Regulation Branch
Transportation Provider: N/A
Airfare: N/A

Lodging: N/A
Meals: \$ 94.28
Other Expenses: \$ 196.02
Total Expenses: \$ 290.30

Entry Number: 29
Meeting or Event Name/Location: Insurance Summit, Kansas City, MO
Travel Dates: 9/16/24-9/18/24
Official's Title, Department/Division: Division Chief, Licensing Services Division
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 30.00
Other Expenses: \$ 168.24
Total Expenses: \$ 198.24

Entry Number: 30
Meeting or Event Name/Location: Insurance Summit, Kansas City, MO
Travel Dates: 9/12/24-9/18/24
Official's Title, Department/Division: Staff Services Manager II, Rate Regulation Division, Rate Regulation Branch
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 21.03
Other Expenses: \$ 110.01
Total Expenses: \$ 131.04

Entry Number: 31
Meeting or Event Name/Location: Insurance Summit, Kansas City, MO
Travel Dates: 9/15/24-9/19/24
Official's Title, Department/Division: Supervising Insurance Examiner, Financial Surveillance Branch
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 56.00
Other Expenses: \$ 131.60
Total Expenses: \$ 187.60

Entry Number: 32
Meeting or Event Name/Location: Insurance Summit, Kansas City, MO
Travel Dates: 9/15/24-9/19/24
Official's Title, Department/Division: Division Chief, Financial Analysis Division, Financial Surveillance Branch
Transportation Provider: N/A

Airfare: N/A
Lodging: N/A
Meals: \$ 134.00
Other Expenses: \$ 139.83
Total Expenses: \$ 273.83

Entry Number: 33
Meeting or Event Name/Location: Insurance Summit, Kansas City, MO
Travel Dates: 9/15/24-9/18/24
Official's Title, Department/Division: Senior Insurance Rate Analyst, Market Conduct Division -
Field Rating & Underwriting Bureau, Consumer Services & Market Conduct Branch
Transportation Provider: N/A
Airfare: N/A
Lodging: N/A
Meals: \$ 108.00
Other Expenses: \$ 202.27
Total Expenses: \$ 310.27

Entry Number: 34
Meeting or Event Name/Location: 2024 Fraud Director Conference Pittsburgh, PA
Travel Dates: 09/23/24-09/26/24
Official's Title, Department/Division: Deputy Commissioner, Enforcement Branch
Transportation Provider: United Airlines
Airfare: \$ 796.83
Lodging: \$ 680.58
Meals: \$ 121.00
Other Expenses: \$ 447.22
Total Expenses: \$ 2,045.63

Department Total: \$ 10,138.63