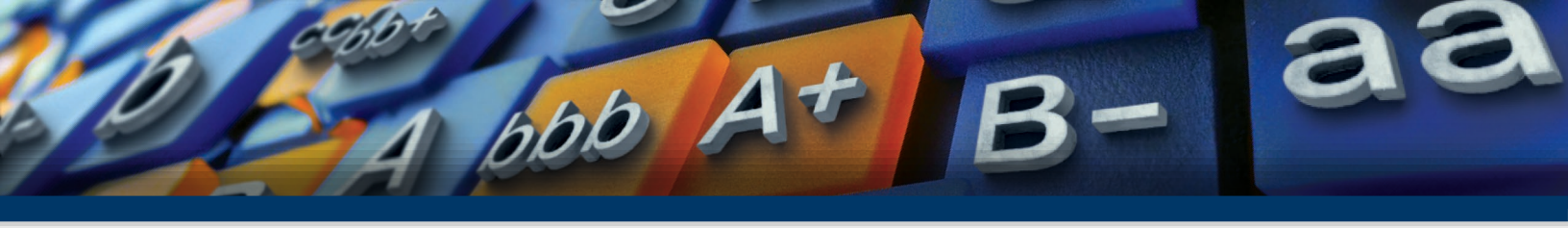

2024 Annual Rating Information Request for Title Insurers

To update your company's rating and complete our annual report if applicable, as well as to update AM Best's Title Industry Database, we require critical financial and operational information that is detailed below. This information will support the publication of individual **Best's Credit Reports** that will become available to subscribers.

We would appreciate receiving the following information as soon as possible, no later than **March 1, 2024** (except as noted).

Please Note: Information required for the processing of financial data supporting the publication of Best's Credit Reports should be sent directly to our ***Data Management Group***. Information used primarily to review your company's rating should be sent directly to your financial analyst in our ***Property/Casualty Ratings Division.*** Specific instructions are included below.

Financial Data

Please submit the following items to our ***Data Management Group*** through our Best's Client Portal (Portal): https://portal.ambest.com/datasubmission/upload.aspx

- **NAIC Annual Electronic Filing:** Please submit your annual statement for the year ending December 31, 2023, via NAIC formatted zip filing as soon as it is available.
- **Additional Statutory Reports/Filings:** Please forward one copy of the following reports:
  - Management Discussion and Analysis (MD&A), **PDF** filing **(by April 1, 2024)**
  - Other required schedules and exhibits filed with your domiciliary regulators.
- **Best's Supplemental Rating Questionnaire (SRQ):** If required, a separate request for the 2023 SRQ will be sent to your company. Due to the importance of the information provided by this questionnaire, its completion is **required** as part of your company's rating review. Additional communication regarding the SRQ filing via the Portal will be sent to your Portal Administrator **(due by April 1, 2024).**
- **NAIC Quarterly Electronic Filing:** Please submit your quarterly filings via NAIC formatted zip filing as they become available at the end of each quarter. Failure to send quarterly filings may have an adverse effect on your company's Best's Credit Rating.

You may contact Technical Support Services with any questions regarding the Portal:
Toll Free: 800-544-2378 or email Technical Support@ambest.com

Rating Review Material

Please submit the following items directly to your financial analyst. We request that your company submits documentation using the Best's Client Portal Message Center: https://portal.ambest.com/

- **Additional Statutory Reports/Filings:** Please forward **one** copy of the following reports:
  - 2023 Independent CPA Audit Report
  - Insurance Department Financial Examination Reports issued in 2023/2024
  - Schedule BA Assets - Provide available additional detail by type/style of hedge fund/private equity investments
  - Own Risk and Solvency Assessment (ORSA)

Please Note: If you intend to submit any documents not included on the *above* lists, and you believe these documents could contain material confidential information, please contact your financial analyst at (908) 439-2200, for specific submission instructions.

Thank you for your continued cooperation and support.
AM Best