



Insurance Services e-news

SEPTEMBER 2007

Do you have life insurance or long term care policies on the books?

Did you know that distributors have an opportunity to receive Insurance commission, position, valuation and financial transaction activity data through Insurance Services for over 40 Life companies? Find out which ones. Contact your Relationship Manager or Susan Nugent at snugent@dtcc.com or 212.855.5685 to find out more.

2007/2008 Insurance Services Product Development Plan (Now Online!)

We have made our 12-18 month product development plan available online as a budgetary and development planning resource for our customers and partners. The plan can be found by [clicking here](#). Please be aware that our development for Fund Transfers, Attachments and Replacements will be available for both life and annuity business. Questions can be directed to Randi Gordon at rbgordon@dtcc.com or 212.855.5654.

September Enhancement Release (Update)

The release goes live on September 6, 2007. As a reminder, this enhancement release will only impact the Positions and Values (POV) and Initial Applications / Subsequent Premiums (APP/SUB) products. This release supports the work done by the NAVA Data Conformity Group on standardizing Service Feature / Rider Classification. Please see the participant section of our website for enhancement release documentation.

FAR Standard Usage Working Group (Update)

DTCC has formed a working group to address FAR standard usage as it relates to performance tracking and gain/loss reporting. Initial meetings have been limited to distributors to create a unified recommendation that will be presented to the carriers at a later date. The working group kick-off conference call took place on August 6th with six distributors present and an in-person meeting is being planned for October. Please contact Jamie Taylor for more information at jtaylor@dtcc.com or call 636.244.0973.

Insurance Services Web Section (Reminder)

The best source for public and participant information is the new DTCC website ([dtcc.com](http://www.dtcc.com)). In the coming months the old Insurance Services participant section will be removed. Please be sure to access the participant section from the updated Insurance section of the DTCC.com web site. URL: <http://www.dtcc.com/products/insurance/>.

22c-2 (Update)

If you missed the last industry update call, please join the next one on September 20 from 2:00-3:30 pm ET. We will continue to collect questions to be reviewed during the next call. Please submit your questions to insurance@dtcc.com. For any additional information please contact Jeanann Smith at jsmith@dtcc.com or call 614.405.2004.

L&A Conference Call

A conference call has been scheduled for Friday, September 7, 2007 from 11:00am to 12:30pm ET to review standard usage regarding the L&A Carrier reject process. The goal of this conference call is to reach a consensus on how the reject process should work and to document it as official standard usage. We need participation from all of our L&A users to accomplish this. For more information please contact Craig Gurien at cgurien@dtcc.com or 212.855.5649.

Replacements (Pilot Firms Wanted!)

This is a reminder that pilot firm meetings for Replacements will begin in the 4th quarter of 2007. Firms that are interested in participating during the pilot phase should contact Cory Stark at cstark@dtcc.com or call 212.855.1683. The projected launch date for Replacements is during the 3rd quarter of 2008.

Coming Soon

The Insurance Services division is currently building an online directory to promote our participation in, or partnership with Industry Associations and Solution Providers. A communication will follow once the directory is complete.

Upcoming Events

September 9-11: NAVA Annual Meeting (Attendees: John Ziambras, Lana Macumber)

