

Freedom to Travel

(Pursuant to Section 626.9541(1)(dd), Florida Statutes)

Scope Period: Calendar Year

The Florida Office of Insurance Regulation (Office) collects Freedom to Travel data on an annual basis, pursuant to Section 626.9541(1)(dd), Florida Statutes.

Companies required to complete this data call have an active certificate of authority and active authority in one or more of the following lines of business:

- 400 - LIFE
- 405 - VARIABLE ANNUITIES
- 410 - GROUP LIFE AND ANNUITIES
- 420 - VARIABLE LIFE
- 425 - FRATERNAL LIFE

Compliance reports are to be submitted on an individual company basis. Group reports will not be accepted.

Please Read All Instructions Below Carefully - They Have Changed.

The Freedom to Travel filing is to be submitted to the Office beginning January 1. The list of questions can be accessed from our website at:

<https://www.floir.com/siteDocuments/CYFreedomTravelSurveyQuestions.pdf>.

Companies are required to report, pursuant to sections 624.316, 624.318(2), and 641.27, Florida Statutes. Failure to comply may result in a referral to OIR's Life and Health Market Regulation Unit for further action.

The Insurance Regulation Filing System (IRFS) is to be used to submit your data. It can be found by clicking on the below address: <https://irfs.fldfs.com/>

STEPS FOR PROCESSING AND REPORTING DATA TO THE OFFICE OF INSURANCE REGULATION:

- Enter IRFS using the link <https://irfs.fldfs.com/>.
- New users must subscribe to a company (ies) using the Entity Management from their filing workbench. Note you will not be able to create filings until you subscribe to at least one company.
- Step 1 - select the option "Create a Filing" then click on "Next".
- Step 2 - choose "Company" and the correct company for which you are creating the filing. Click on "Next".
- Step 3 - skip next step, which is for group filings (not permitted with this data call).
- Step 4 - in the final step click on "Create" and confirm the creation of the filing with "OK". Your filing will be on the Workbench.
- You must repeat steps 1 - 4 to create a Filing for each company that you represent.
- View and edit the filing on the Workbench by clicking the Filing ID in the first column.

- View the components by clicking on the Filing ID (first column from the left).
- Click on the plus sign "+" to open individual components. Responding to all required components is mandatory for achieving successful reporting. "Incomplete" components are clearly indicated.
- In the **Contacts Component**, other email accounts subscribed to your company will be listed under Add Company Contact. You may include additional email addresses that are not subscribers of the company in the text box. Any email listed in this component will receive email notifications about the filing. Click Save.
- Select the **Freedom to Travel (FREE) Survey Component** and answer the questions. Click Save. This is mandatory. If a question is not applicable to your filing, the response should be noted as "N/A" or "0" (zero) for numeric fields.
- The **Notarized Affidavit Component** requires that you have a company officer sign and attest to the veracity of the contents of your filing. Upload a PDF version of the affidavit into this component. For sample affidavits, you may visit our website at the following address: <http://www.floir.com/siteDocuments/CertificationNotarizedAffidavitFREE.doc>.
- Select the **Explanatory Information Component** for nonzero responses to questions 3, 4, 5 and 6, provide an explanation for taking such action (for each specific case included in a given numeric response). Explanations must include a brief summary and any supporting data used in taking such action. This information shall be uploaded with your submission using the 'Explanatory Information' component on your component list.
- **When all mandatory components are Complete, you must click the Submit button; only then your filing will be submitted successfully.**
- You and any accounts listed in Company Contacts will receive an email receipt with your Filing ID and File Log Number. If you do not receive an email and the submission status does not change to Received, contact the Market Research and Technology Unit.

The required reporting survey for each calendar year will be available in IRFS on the first day noted as the System opening day above (Example: FREE CY2020 can be accessed and filed as early as January 1, 2021).

You are receiving this message because you have been identified as a required filer under Florida's "Freedom to Travel" statutory law. We are furnishing instructions to guide you to timely file your report with the Florida Office of Insurance Regulation. This communication is being sent to the person who submitted this report last year and to the most current NAIC Annual Statement Contact on record with this Office. Please coordinate your reporting to alleviate any duplicate filings.

If you have any questions regarding this request, please contact: **via email:** FreedomToTravel@floir.com

Your prompt cooperation in this effort will be greatly appreciated.

Thank you.

Florida Office of Insurance Regulation
Market Data Collections Section 850-413-3147