## NAIC Checklist to OCI Financial Portal Mapping

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## NAIC Checklist to OCI Financial Portal Mapping

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## Actuarial

| Actuarial Certification Regarding use of 2001 Preferred Class Table               | Annual Actuarial Supplement (Due 3/1) | Life | LAH FR | Annual | 3/1, if applicable |
| Actuarial Certification Related Annuity Nonforfeiture                             | Annual Actuarial Supplement (Due 3/1) | Life | LAH FR | Annual | 3/1, if applicable |
| Actuarial Memorandum Related to Universal life with Secondary Guarantee Policies Required by Actuarial Guideline XXXVIII 8D | Annual Actuarial Memorandum (Due 4/30) | Life | LAH FR | Annual | 4/30, if applicable |
| Executive Summary of the PBR Actuarial Report                                    | PBR Actuarial Report Exec Summary  | Life | LAH FR | Annual | 4/1, if applicable |
| Actuarial Opinion on Separate Accounts Funding Guaranteed Minimum Benefit         | Annual Actuarial Supplement (Due 3/1) | Life | LAH FR | Annual | 3/1, if applicable |
| Actuarial Opinion on Synthetic Guaranteed Investment Contracts                   | Annual Actuarial Supplement (Due 3/1) | Life | LAH FR | Annual | 3/1, if applicable |
| Actuarial Opinion on X-Factors                                                    | Annual Actuarial Supplement (Due 3/1) | Life | LAH FR | Annual | 3/1, if applicable |
| Request for Life PBR Exemption                                                    | Life PBR Exemption          | Life | LAH FR | Annual | 7/1, if applicable |
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Last Updated: 2/26/2021
# NAIC Checklist to OCI Financial Portal Mapping

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