



STATE OF INDIANA

FILED

ERIC J. HOLCOMB, GOVERNOR

Indiana Department of Insurance

JUN 28 2023

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INDIANA STATE
ETHICS COMMISSION

Name of Agency or Office: Indiana Department of Insurance

Name of Recipient: Steven Embree

Title of Recipient: Deputy Commissioner, Agency Services

Brief Description of Item Solicited, Accepted, or Received and approximate value of item:
Vertafore has offered to pay travel, lodging, and meals for Recipient to attend the 2023 SIRC Summit. The meeting will be held from July 17-19 in East Lansing, Michigan. The meeting is an opportunity for members of the industry to give insight on how the industry is shifting and how to better support clients going through these changes as an industry partner. Recipient will participate in the Best Practices Sessions panel with other state regulators. The approximate value of Donor's gift is \$500.

Date of Receipt: July 17-19, 2023

Name of Donor: Vertafore, Inc.

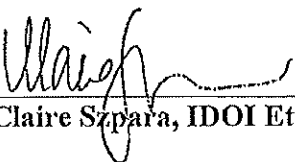
Donor's Address: 999 18th Street, 4th Floor Denver, CO 80202

Nature of Business Relationship with Agency: Vertafore develops software used in the insurance industry. Vertafore owns Sircon Corporation (Sircon). Sircon has a contract with the IDOI to provide various types of software to the State, including producer licensing, company admissions, and rate and form filings. Sircon also provides online services to the public on behalf of the State, including insurance producer license applications and renewals, and continuing and pre-licensing provider course approval applications.


State Why Acceptance is in the Public Interest: As Sircon is contracted to provide various types of software services to the IDOI, it is imperative that IDOI staff keep up-to-date with new company and software developments, especially since it is the software that is used by the agency and the public we serve. IDOI staff have previously attended events hosted by Vertafore with a gift waiver.

Additionally, the purpose of this event is to review and discuss state-specific changes with Vertafore and the National Insurance Producer Registry (NIPR), which is the database used by States for producer licensing.

Recipient has been asked to speak at this meeting and present the milestone successes of Indiana to the state participants. It is in the public interest to develop and maintain good relationships with Vertafore and Sircon representatives in order to keep the lines of communication open to the benefit of all. Recipient's attendance will allow Recipient the opportunity to connect with insurance regulators from other states and other insurance industry folks. Recipient's attendance at the 2023 SIRC Summit helps to achieve all of these important objectives and is in the public interest.



Claire Szpara, IDOI Ethics Officer



Date

ACCREDITED BY THE NATIONAL ASSOCIATION OF INSURANCE COMMISSIONERS

AGENCY SERVICES 317-232-2389 COMPANY COMPLIANCE 317-232-3495 CONSUMER SERVICES 317-232-2395/1-800-622-4461 FINANCIAL SERVICES 317-232-2390 MEDICAL MALPRACTICE 317-232-2402 COMPANY RECORDS 317-232-5692 STATE HEALTH INSURANCE PROGRAM 1-800-452-4800

