



District of Columbia  
Department of Insurance, Securities and Banking

**LIFE AND HEALTH INSURANCE GUARANTY FUND CLASS B ASSESSMENT RECOVERY FORM**

Company Name: \_\_\_\_\_

NAIC Code: \_\_\_\_\_

Tax Year: \_\_\_\_\_

Year Assessed	Life Assessed	Life Refund	A&H Assessed	A&H Refund	Total Amount Assessed	Total Amount Refunded	Year Taken	Tax Credit (Refund) to Line 12e	Amortized Tax Credit Schedule													
2009																						
2010							2010															
2011							2011															
2012							2012															
2013							2013															
2014							2014															
2015							2015															
2016							2016															
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2018							2018															
2019							2019															
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							2025															
							2026															
							2027															
							2028															
							2029															

**Note: Proof of payment for assessments must be attached.** This form applies to **Class B Assessments** imposed by the D.C. Life and Health Insurance Guaranty Association, pursuant to D.C. Law 9-129, D.C. Official Code § 31-5410. The form must be completed and filed with the **Insurance Tax Return** by all companies taking Life and Health Guaranty Fund tax credits on the Insurance Tax Return. These include Life and Health companies, and Property and Casualty companies that write Life and Health business. **(A COMPUTER WORKSHEET MAY BE SUBMITTED IN PLACE OF THIS FORM.)**

**Note:** The District of Columbia allows companies to assume Life and Health Guaranty Fund tax credits through mergers or acquisitions. Any credits assumed should be added to your company's tax credits for the corresponding year of the original assessment. In addition, companies whose total Class B assessment is between \$0.10 and \$9.99 for any single year should take one single credit the following year.