



**DEPARTMENT OF INSURANCE, SECURITIES AND BANKING  
INSURANCE BUREAU  
LOCKBOX 92180, WASHINGTON, D.C. 20090-2180**

**EXAMPLE**

**Company Name:** ABC Insurance Company

**NAIC Code:** 12345     **Tax Year:** 2011

**DISTRICT OF COLUMBIA LIFE AND HEALTH INSURANCE GUARANTY FUND ASSESSMENT PREMIUM TAX CREDIT CLASS B ASSESSMENT RECOVERY**

Year Assessed	Life Assessed	Life Refund	A&H Assessed	A&H Refund	Total Amount Assessed	Total Amount Refunded	Year Taken	Tax Credit Schedule	Amortized Tax Credit Schedule												
2001	300	0	0	0	300	0															
2002	0	0	0	0	0	0	2002	30	30												
2003	150	0	0	0	150	0	2003	30	30	0											
2004	75	0	0	0	75	0	2004	45	30	0	15										
2005	-200	0	0	0	-200	0	2005	52	30	0	15	7									
2006	-50	0	0	0	-50	0	2006	32	30	0	15	7	-20								
2007	0	0	0	0	0	0	2007	27	30	0	15	7	-20	-5							
2008	50	0	0	0	50	0	2008	27	30	0	15	7	-20	-5	0						
2009	150	0	50	0	200	0	2009	32	30	0	15	7	-20	-5	0	5					
2010	0	-50	0	-350	0	-400	2010	52	30	0	15	7	-20	-5	0	5	20				
2011	150	0	0	-200	150	-200	2011	-348	30	0	15	7	-20	-5	0	5	20	0			
							2012	-163		0	15	7	-20	-5	0	5	20	0	15		
							2013	37			15	7	-20	-5	0	5	20	0	15		
							2014	22				7	-20	-5	0	5	20	0	15		
							2015	15					-20	-5	0	5	20	0	15		
							2016	35						-5	0	5	20	0	15		
							2017	40							0	5	20	0	15		
							2018	40								5	20	0	15		
							2019	35									20	0	15		
							2020	15										0	15		
							2021	15											15		
	625	-50	50	-550	675	-600		70	300	0	150	70	-200	-50	0	50	200	0	150		

**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. 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.