

FORMS – POLICYWRITING SUPPORT

SEPTEMBER 21, 2021

CRIME AND FIDELITY

LI-CR-2021-061

## ADVISORY SAMPLE NOTICES TO POLICYHOLDERS FOR 2021 CRIME AND FIDELITY MULTISTATE FORMS REVISIONS FURNISHED

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### KEY MESSAGE

Sample policyholder notices outlining the broadenings, reductions and other changes included in multistate forms filings CR-2021-OFR21, are provided.

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### UPGRADE TO WORD AND EXCEL DOCUMENTS

As previously noted, ISO is implementing changes to our authoring and delivery systems so that **newly created** documents will be delivered in Office 365 .docx/.xlsx format to be phased in by product/service. In addition to **form** documents, we are pleased to announce that during the third quarter 2021, you will be receiving **circular cover letter** and **Notice To Manualholders (NTM)** documents in .docx format delivered/accessed via Circulars, CLM, EFD, ERC, Filings, FIRST, Forms Library, PRM and Suite +. Changes continue for other document types to be phased in by product/service. Products impacted include, but are not limited to, documents delivered/accessed via Circulars, CLM, EFD, ERC, Filings, FIRST, Forms Library (including PolicyWriting Support Forms Instructional Supplement), PRM, Statistical Plans and Suite +.

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### BACKGROUND

In referenced circular [LI-CR-2021-007](#), we announced the submission of 2021 Crime and Fidelity multistate forms filings CR-2021-OFR21.

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### ISO ACTION

The implementation of these filings will result in broadenings and reductions in coverage under certain circumstances. We have prepared the attached advisory policyholder notices that describe these coverage changes.

#### Note:

We have not filed these Advisory Notices To Policyholders, consistent with our normal practices. Each individual insurer is responsible for complying with regulatory requirements (if any) in each jurisdiction.

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## USE OF THE SAMPLE ADVISORY NOTICE TO POLICYHOLDERS

The sample Advisory Notice To Policyholders is intended to assist you in preparing your own policyholder notices. The content of the sample Advisory Notice To Policyholders merely reflects our perception of the coverage affected by this revision. Any use, modification or distribution of the sample Notices should be determined based on your interpretation of the coverage afforded and your company's claims settlement history (if any) in deciding whether to utilize the information in the sample Notices in whole or in part.

### Note:

We have NOT filed the Advisory Notice To Policyholders, consistent with our normal practices. Each individual insurer is responsible for complying with regulatory requirements (if any) in each jurisdiction.

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## FORMS AVAILABILITY

The following document is now available for your use as outlined above:

- [CR P 008 06 22](#) 2021 Crime And Fidelity Multistate Forms Revision Advisory Notice To Policyholders

We have also developed Instructional Supplements that provide instructions for the use of each document described above. To access the Instructional Supplements in the ISONet Forms Library, click on the Policywriting Support Forms Instructional Supplement link on the left side of the Policywriting Support Forms search results screen.

Subscribers to the ISONet Forms Library for General Liability and Commercial Liability Umbrella will be able to download the forms directly over ISONet.

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## APPLICABILITY OF POLICYWRITING SUPPORT FORMS

For information regarding the applicability of Policywriting Support Forms by line of insurance in a given jurisdiction, refer to the Policywriting Support Forms Instructional Supplement. Subscribers to FIRST (Forms Information Report/System) on ISONet may also check applicability there.

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## REFERENCE

[LI-CR-2021-007](#) (08/25/2021) Crime And Fidelity Multistate Forms Being Submitted

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## CONTACT INFORMATION

If you have any questions concerning:

- The content of this circular, please contact:  
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