

**Annual Report
Joint Property and/or Liability
Self Insurance Program**

Program Name _____

For Most Recent Completed Fiscal Year

1. Provide a copy of the financial statement for the completed past fiscal year.
2. Provide copy of the year end actuarial solvency report.
3. Provide information regarding any changes made to the Interlocal Agreement or Bylaws.
4. Provide a copy of any program annual report to the membership.
5. Provide a list of any membership changes.

For Subsequent Fiscal Year

1. Provide a copy of the program budget (admin., ins., claims). Please include a copy of the actuarial rate setting report.
2. Describe changes in self insured retention levels and limits for each coverage.
3. Provide a copy of all coverage documents (*May be provided on disc*) received from insurance companies.
4. Provide information regarding any proposed changes to the Interlocal Agreement or Bylaws.
5. Provide a copy of the summary of insurance coverage provided to the membership
6. Provide a listing of any changes in service providers (i.e.: pool administration; claims administration; loss control consultant; actuary; broker).
7. Provide information regarding any anticipated significant changes.
8. Provide the dates/locations of Board meetings/Annual member meetings.

SIGNATURE: _____

TITLE: _____

DATE: _____

The annual report may be submitted electronically with a scan of this page signed by the pool administrator.