

STATE OF INDIANA)
) SS:
COUNTY OF MARION)

BEFORE THE INDIANA
COMMISSIONER OF INSURANCE

CAUSE NO.: 22959-AG24-0123-015

ADMINISTRATIVE CAUSE NO.: DOI-2407-001591

IN THE MATTER OF:

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

Respondent.

Type of Agency Action: Enforcement

License Number: 826681

FILED

AUG 27 2026

STATE OF INDIANA
DEPT. OF INSURANCE

FINAL ORDER

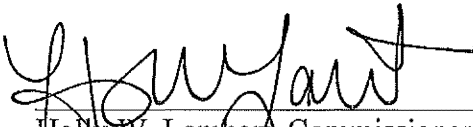
The Enforcement Division of the Indiana Department of Insurance (“Department”), by counsel, Samantha Aldridge, and Jason Sword (“Respondent”), a licensed resident insurance producer, signed an Agreed Entry which purports to resolve all issues involved in the above-captioned cause number, and which has been submitted to the Commissioner of the Indiana Department of Insurance (“Commissioner”) for approval.

The Commissioner, after reviewing the Agreed Entry, which suspends Respondent’s resident producer insurance license for a period of two and half (2.5) years due to the nature of Respondent’s termination for cause, finds it has been entered into fairly and without fraud, duress or undue influence, and is fair and equitable between the parties. The Commissioner hereby incorporates the Agreed Entry attached, as if fully set forth herein, and approves and adopts in full the Agreed Entry as a resolution of this matter.

IT IS THEREFORE ORDERED by the Commissioner as follows:

1. Respondent's resident producer license number 826681 shall be suspended for a period of two and a half (2.5) years, beginning the date of this Final Order.
2. Respondent may not reapply for licensure prior to 2-27-29.
3. The Department agrees to accept this agreement as full resolution of this matter.

8/27/26
Date Signed


Holly W. Lambert, Commissioner
Indiana Department of Insurance

Distribution:

Samantha Aldridge, Attorney
ATTN: Gina Davies, Insurance Investigator
Indiana Department of Insurance
311 West Washington St, Suite 103
Indianapolis, Indiana 46204-2787

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

Curt Moutardier
400 Pearl Street
Suite 204
New Albany, IN 47150

STATE OF INDIANA)
)
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SS:

BEFORE THE INDIANA
COMMISSIONER OF INSURANCE

CAUSE NO.: 22959-AG24-0123-015
ADMINISTRATIVE CAUSE NO.: DOI-2407-001591

IN THE MATTER OF:

Jason Sword
13962 Highway 31 N
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STATE OF INDIANA
DEPT. OF INSURANCE

AGREED ENTRY

This Agreed Entry is executed by and between the Enforcement Division of the Indiana Department of Insurance ("Department"), by counsel, Samantha Aldridge, and Jason Sword ("Respondent"), to resolve all issues in the above-captioned cause number. This Agreed Entry is subject to the review and approval of Holly W. Lambert, Commissioner of the Indiana Department of Insurance ("Commissioner").

WHEREAS, Respondent is a licensed resident insurance producer, holding license number 826681 since July 2, 2012;

WHEREAS, Respondent was owner and Designated Responsible Licensed Producer ("DRLP") for resident producer organization Senior Source Insurance, LLC which was licensed from April 11, 2016 until license expiration on April 30, 2024;

WHEREAS, Respondent was employed by Anthem Insurance Companies, Inc., Anthem Life Insurance Company, Inc., Healthkeepers Inc., and Community Insurance Company (hereafter "Anthem"), from September 4, 2018 until December 15, 2023;

WHEREAS, on December 15, 2023, Respondent was terminated for cause from Respondent's position as Director of Sales at Anthem for mishandling information that Anthem considers confidential, proprietary and/or customer protected information and for sharing said information with Senior Source Insurance, LLC, Alan Sword and Matthew Wiegman, in violation of conflict-of-interest agreements between Respondent and Anthem;

WHEREAS, Respondent asserts Respondent communicated openly with Alan Sword, Matthew Wiegman, and Senior Source Insurance, LLC, throughout Respondent's employment at Anthem. Respondent further asserts Respondent's supervisor was included in communications at various times with Alan Sword, Matthew Wiegman, and Senior Source Insurance, LLC;

WHEREAS, on January 25, 2024, the Commissioner issued a Findings of Fact, Conclusions of Law, and Emergency Order suspending Respondent's license for ninety (90) days, due to Respondent's termination for cause and has been renewed throughout the duration of the above captioned proceedings;

WHEREAS, on July 9, 2024, the Department filed a Statement of Charges against Respondent alleging violation of Indiana Code 27-1-15.6-12(b)(8);

WHEREAS, Indiana Code § 27-1-15.6-12(b)(8), states, in part, that the Commissioner may levy a civil penalty and place an insurance producer on probation for a period of years for using fraudulent, coercive, or dishonest practices, or demonstrating incompetence, untrustworthiness, or financial irresponsibility in the conduct of business in Indiana or elsewhere;

WHEREAS, the Department and Respondent (collectively, the "Parties") agree this Administrative Action may not form the basis for denial of Respondent's future application(s)

for resident producer licensure after the conclusion of the two and half (2.5) year suspension period;

WHEREAS, the Parties desire to resolve this matter without the necessity of a hearing.

IT IS, THEREFORE, NOW AGREED by and between the Parties as follows:

1. The Commissioner has jurisdiction over the subject matter and the Parties to this Agreed Entry.
2. In order to avoid formal litigation in this matter, Respondent has determined that it is in Respondent's best interests to enter into this Agreed Entry. As such, Respondent acknowledges that Respondent executes this Agreed Entry with full realization of its contents and effects.
3. This Agreed Entry is executed knowingly, voluntarily, and freely by the Parties. The Parties agree that the terms of this Agreed Entry constitute final resolution of this matter.
4. Respondent knowingly, voluntarily, and freely waives the right to a public hearing on this matter, including the right to appear in person before the Commissioner, present evidence, cross-examine witnesses, and present arguments.
5. Respondent knowingly, voluntarily, and freely waives the right to judicial review of this matter or otherwise appeal or challenge the validity of this Agreed Entry.
6. Respondent knowingly, voluntarily, and freely waives, releases, and forever discharges all claims or challenges, known or unknown, against the Department, its Commissioner, employees, agents, and representatives, in their individual and

official capacities, that arise out of or are related to the Agreed Entry or Final Order, including but not limited to any act or omission as part of the underlying audit, investigation, negotiation, or approval process.

7. Respondent's Indiana resident producer license shall be suspended for a period of two and half (2.5) years, along with all authority Respondent has to conduct insurance business in the State of Indiana, effective the date Commissioner signs the Final Order adopting this Agreed Entry. During the suspension period, any violations of Title 27 of the Indiana Code will result in the Department seeking immediate revocation of Respondent's license.
8. Respondent has had the opportunity to have this Agreed Entry reviewed by legal counsel of Respondent's choosing, at Respondent's own expense, and is aware of the benefits gained and obligations incurred by the execution of this Agreed Entry. Respondent understands and agrees that the Department cannot give legal advice.
9. Respondent has entered into this Agreed Entry knowingly, voluntarily, and freely, and has not been subject to duress, coercion, threat, or undue influence.
10. This Agreed Entry constitutes the entire agreement between the Parties, and no other promises or agreements, express or implied, have been made by the Department or by any employee, director, agent, or other representative thereof to induce Respondent to enter this Agreed Entry.
11. The Department agrees to accept Respondent's compliance with the terms of this Agreed Entry as full satisfaction of this matter and warrants and represents that so long as Respondent complies with the terms of this Agreed Entry, the Department

will not bring any further action against Respondent based on the facts that gave rise to this Agreed Entry.

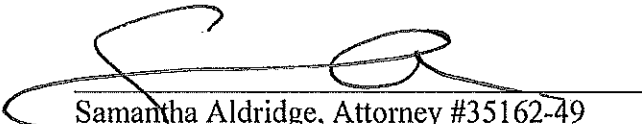
12. In the event the Department finds there has been a breach of any of the provisions of this Agreed Entry, the Department may reopen this matter and pursue alternative action pursuant to Indiana Code § 27-1-15.6-12.
13. Respondent waives any applicable statute of limitations for purposes of any enforcement of the terms and conditions of this Agreed Entry.
14. Respondent acknowledges that this Agreed Entry may be admitted into evidence in any judicial or administrative proceeding against Respondent to enforce the terms and conditions contained herein.
15. Respondent understands that this Agreed Entry resolves only the matter pending with the Department and does not affect any criminal prosecution or civil litigation that may be pending or hereinafter commence against Respondent.
16. This Agreed Entry does not in any way affect the Department's authority in future audits, investigations, examinations, negotiations, or other complaints involving Respondent, excluding the underlying facts in the above captioned matter, as known to the Department as of the date of this Agreed Entry.
17. It is expressly understood that this Agreed Entry is subject to the Commissioner's acceptance and has no force or effect until such acceptance is evidenced by the entry of a Final Order by the Commissioner.
18. Should this Agreed Entry not be accepted by the Commissioner, it is agreed that presentation to, and consideration of this Agreed Entry by the Commissioner,

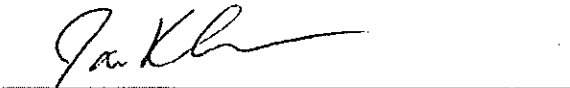
shall not unfairly or illegally prejudice the Commissioner or Respondent from further participation in or resolution of these proceedings.

19. If this Agreed Entry is accepted by the Commissioner, it will become part of Respondent's permanent record and may be considered in future actions brought by the Department or any other regulator against Respondent. This Agreed Entry shall not be used as the sole basis in any further administrative action by the Department against the Respondent. It is further understood that, if accepted by the Commissioner, this Agreed Entry and resulting Final Order are public records pursuant to Indiana Code § 4-21.5-3-32 that may not be sealed or otherwise withheld from the public and may be reported to the National Association of Insurance Commissioners and published on the Department's website as required.
20. Respondent acknowledges that this is an Administrative Action Respondent may be required to report to other jurisdictions in which Respondent is licensed and on future licensing applications.

8/27/26
Date Signed

8-25-26
Date Signed


Samantha Aldridge, Attorney #35162-49
Indiana Department of Insurance


Jason Sword, Respondent

STATE OF Indiana)
) SS:
COUNTY OF Floyd)

Before me a Notary Public for Floyd County, State of
Indiana personally appeared Jason Sword and being first duly sworn by me upon Jason
Sword's oath, says that the facts alleged in the foregoing instrument are true.

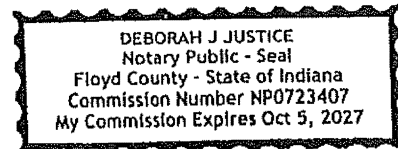
Signed and sealed this 25th day of August, 2026.

Deborah J. Justice
Signature

Deborah J. Justice
Printed

My Commission expires: 10/5/27

County of Residence: Jefferson



Return executed originals to:
INDIANA DEPARTMENT OF INSURANCE
Enforcement Division
311 West Washington Street, Suite 103
Indianapolis, IN 46204 2787

STATE OF INDIANA)
) SS:
COUNTY OF MARION)

BEFORE THE INDIANA
COMMISSIONER OF INSURANCE

CAUSE NO.: 22959-AG24-0123-015

IN THE MATTER OF:)

Jason Sword)
13962 Highway 31 N)
Memphis, IN 47143)

Respondent.)

Type of Agency Action: Enforcement)

License Number: 826681)

FILED

JUL 30 2026

STATE OF INDIANA
DEPT. OF INSURANCE

ORDER GRANTING MOTION TO RENEW EMERGENCY SUSPENSION

Indiana Department of Insurance Commissioner Holly W. Lambert, now being so advised, hereby grants Department's Motion to Renew Emergency Suspension against Respondent for an additional ninety (90) days, pursuant to Indiana Code § 4-21.5-4-5(b), or until a Final Order is issued in this matter, whichever time period is least.

July 30, 2026
Dated

Holly W. Lambert
Holly W. Lambert, Commissioner
Indiana Department of Insurance

Distribution to:

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

Curt Moutardier
400 Pearl Street
Suite 204
New Albany, IN 47150

Samantha Aldridge
Attorney
Indiana Department of
Insurance
311 W Washington St,
Suite 103
Indianapolis, IN 46204

STATE OF INDIANA)
) SS:
COUNTY OF MARION)

BEFORE THE INDIANA
COMMISSIONER OF INSURANCE

CAUSE NO.: 22959-AG24-0123-015

IN THE MATTER OF:)
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Jason Sword)
13962 Highway 31 N)
Memphis, IN 47143)
)
Respondent.)
)
Type of Agency Action: Enforcement)
)
License Number: 826681)

FILED

JUL 30 2026

STATE OF INDIANA
DEPT. OF INSURANCE

MOTION FOR RENEWED EMERGENCY SUSPENSION

The Enforcement Division of the Indiana Department of Insurance (“Department”), pursuant to Indiana Code § 4-21.5-4 *et seq.*, files its petition for a renewed emergency suspension against producer Jason Sword (“Respondent”), and states:

1. Respondent is a resident insurance producer holding license number 826681 since July 2, 2012.
2. Respondent’s license expires on October 31, 2026.
3. Respondent’s license is currently suspended on an emergency suspension since November 18, 2025, which is set to expire on August 5, 2026.
4. On December 15, 2023, the Department received notification that Respondent was terminated for cause from Anthem Insurance Companies, Inc., Anthem Life Insurance Company, Inc., Healthkeepers Inc., and Community Insurance Company (hereafter, “Anthem”).

5. Respondent was employed by Anthem from September 4, 2018, to December 15, 2023; Respondent's role at the time of his termination was as Anthem's Director of Sales. In this role, Respondent was responsible for directing and coordinating sales activities for Medicare programs and developing strategies and sales plans for membership growth.
6. Prior to Respondent being employed by Anthem, Respondent was an independent insurance producer working with his brother, Alan Sword, who is a licensed Indiana resident producer, and their agency Senior Source Insurance, LLC ("Senior Source").
7. Alan Sword and Senior Source both held appointments to sell products on behalf of Anthem.
8. At the time of Respondent's hiring at Anthem, Respondent completed a conflict-of-interest survey, representing the following:
 - a. Respondent would not have any contact or make decisions surrounding Anthem business in regard to Senior Source;
 - b. Alan Sword owned 50% of Senior Source;
 - c. Respondent would not sell any products for Senior Source; and
 - d. Respondent's coworker at Anthem would continue to manage Senior Source's business on behalf of Anthem.
9. Respondent completed additional conflict-of-interest surveys throughout his employment at Anthem and agreed to and represented that Respondent would refrain from supporting Alan Sword with events, leads, exchange of referrals, and/or sales; and not meet with Alan Sword on a one-on-one basis to discuss Anthem business.

10. On December 18, 2023, the Department was notified by Anthem that between May 24, 2019, and October 25, 2023, Respondent accessed Anthem's confidential, proprietary, and trade secret data without an authorized purpose.
11. The proprietary and confidential information included data regarding Anthem's appointed producers in certain geographical areas, Anthem's national market penetration, sales and growth in comparison to Anthem's competitors, and other data regarding Anthem's sales and products.
12. Respondent intentionally and improperly downloaded this confidential and proprietary information and sent it to himself externally and to others, including Alan Sword.
13. The proprietary and confidential information that Respondent intentionally and improperly downloaded and transmitted was not necessary for Respondent to meet his job requirements and responsibilities.
14. Respondent failed to abide by the conflict-of-interest survey completed at Anthem and breached many of the representations he made therein. Respondent violated Anthem's policies and procedures regarding handling, access, and use of Anthem's confidential, proprietary and/or trade secret information.
15. Respondent shared confidential, proprietary, and/or trade secret information with his brother, Alan Sword, and other producers at Senior Source.
16. The Department has serious consumer protection concerns regarding Respondent's competence and trustworthiness.
17. An emergency exists in that Respondent's continued selling of insurance in the state of Indiana with a valid license places Respondent in a position of trust with Indiana consumers and in control of Indiana consumers' financial circumstances.

18. Indiana Code § 27-1-15.6-12(b)(8) authorizes the Commissioner to suspend an insurance producer for using fraudulent, coercive, or dishonest practices, or demonstrating incompetence, untrustworthiness, or financial irresponsibility in the conduct of business in Indiana or elsewhere.
19. Under Indiana Code § 4-21.5-4-2(a)(1), the Commissioner may, in an emergency, issue orders without notice or an evidentiary proceeding. However, Indiana Code § 4-21.5-4-4 provides that upon issuance of an emergency order, the Respondent may request a hearing as quickly as practicable.
20. The Enforcement Division previously filed a Motion for Emergency Suspension against Respondent on or about January 25, 2024. The Commissioner granted the Enforcement Division's motion, and issued her Findings of Fact, Conclusions of Law, and Emergency Order on January 25, 2024.
21. The Commissioner issued her Order Granting Motions to Renew Emergency Suspension on April 16, 2024, and July 9, 2024.
22. The Enforcement Division previously filed a Motion for Emergency Suspension against Respondent on or about January 16, 2025. The Commissioner granted the Enforcement Division's motion, and issued her Findings of Fact, Conclusions of Law, and Emergency Order on January 16, 2025.
23. The Commissioner issued her Order Granting Motion to Renew Emergency Suspension on August 26, 2025, November 18, 2025, February 11, 2026, May 7, 2026, which is set to expire on August 5, 2026.

24. Indiana Code § 4-21.5-4-5(b) provides that during the pendency of any related proceedings under Indiana Code § 4-21.5-3, the agency responsible for the proceeding may renew the order for successive ninety (90) day periods.
25. It is in the best interest of the public that Respondent's emergency suspension continues until this matter is resolved.
26. Respondent should be required to cease practice as an insurance agent until the Department can be sure that Respondent can practice competently and in an ethically responsible manner.

WHEREFORE, the Enforcement Division requests that the Emergency Order against Respondent be renewed for an additional ninety (90) days, or until a Final Order is issued in this matter, whichever is least, and for all other necessary and proper relief.

/s/ Samantha Aldridge
Samantha Aldridge, Attorney # 35162-49
Indiana Department of Insurance
Enforcement Division
311 W. Washington Street, Suite 103
Indianapolis, Indiana 46204-2787
SAldridge@idoi.in.gov

CERTIFICATE OF SERVICE

I certify that a copy of the foregoing has been served upon the Respondent by United States First Class mail, postage prepaid, and email notice to Respondent, via counsel, the same day as filing.

Curt Moutardier, Attorney for Respondent
400 Pearl Street
Suite 204
New Albany, IN 47150

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

/s/ Samantha Aldridge
Samantha Aldridge, Attorney # 35162-49
Indiana Department of Insurance
Enforcement Division
311 W. Washington Street, Suite 103
Indianapolis, Indiana 46204-2787
saldridge@idoi.in.gov

STATE OF INDIANA)
) SS:
COUNTY OF MARION)

BEFORE THE INDIANA
COMMISSIONER OF INSURANCE

CAUSE NO.: 22959-AG24-0123-015

IN THE MATTER OF:)

Jason Sword)
13962 Highway 31 N)
Memphis, IN 47143)

Respondent.)

Type of Agency Action: Enforcement)

License Number: 826681)

FILED

MAY 07 2026

STATE OF INDIANA
DEPT. OF INSURANCE

ORDER GRANTING MOTION TO RENEW EMERGENCY SUSPENSION

Indiana Department of Insurance Commissioner Holly W. Lambert, now being so advised, hereby grants Department's Motion to Renew Emergency Suspension against Respondent for an additional ninety (90) days, pursuant to Indiana Code § 4-21.5-4-5(b), or until a Final Order is issued in this matter, whichever time period is least.

May 7, 2026
Dated

Holly W. Lambert

Holly W. Lambert, Commissioner
Indiana Department of Insurance

Distribution to:

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

Curt Moutardier
400 Pearl Street
Suite 204
New Albany, IN 47150

Samantha Aldridge
Attorney
Indiana Department of
Insurance
311 W Washington St,
Suite 103
Indianapolis, IN 46204

STATE OF INDIANA)
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DEPT. OF INSURANCE

MOTION FOR RENEWED EMERGENCY SUSPENSION

The Enforcement Division of the Indiana Department of Insurance ("Department"), pursuant to Indiana Code § 4-21.5-4 *et seq.*, files its petition for a renewed emergency suspension against producer Jason Sword ("Respondent"), and states:

1. Respondent is a resident insurance producer holding license number 826681 since July 2, 2012.
2. Respondent's license expires on October 31, 2026.
3. Respondent's license is currently suspended on an emergency suspension since November 18, 2025, which is set to expire on May 11, 2026.
4. On December 15, 2023, the Department received notification that Respondent was terminated for cause from Anthem Insurance Companies, Inc., Anthem Life Insurance Company, Inc., Healthkeepers Inc., and Community Insurance Company (hereafter, "Anthem")

5. Respondent was employed by Anthem from September 4, 2018, to December 15, 2023; Respondent's role at the time of his termination was as Anthem's Director of Sales. In this role, Respondent was responsible for directing and coordinating sales activities for Medicare programs and developing strategies and sales plans for membership growth.
6. Prior to Respondent being employed by Anthem, Respondent was an independent insurance producer working with his brother, Alan Sword, who is a licensed Indiana resident producer, and their agency Senior Source Insurance, LLC ("Senior Source").
7. Alan Sword and Senior Source both held appointments to sell products on behalf of Anthem.
8. At the time of Respondent's hiring at Anthem, Respondent completed a conflict-of-interest survey, representing the following:
 - a. Respondent would not have any contact or make decisions surrounding Anthem business in regard to Senior Source;
 - b. Alan Sword owned 50% of Senior Source;
 - c. Respondent would not sell any products for Senior Source; and
 - d. Respondent's coworker at Anthem would continue to manage Senior Source's business on behalf of Anthem.
9. Respondent completed additional conflict-of-interest surveys throughout his employment at Anthem and agreed to and represented that Respondent would refrain from supporting Alan Sword with events, leads, exchange of referrals, and or sales; and not meet with Alan Sword on a one-on-one basis to discuss Anthem business.

10. On December 18, 2023, the Department was notified by Anthem that between May 24, 2019, and October 25, 2023, Respondent accessed Anthem's confidential, proprietary, and trade secret data without an authorized purpose.
11. The proprietary and confidential information included data regarding Anthem's appointed producers in certain geographical areas, Anthem's national market penetration, sales and growth in comparison to Anthem's competitors, and other data regarding Anthem's sales and products.
12. Respondent intentionally and improperly downloaded this confidential and proprietary information and sent it to himself externally and to others, including Alan Sword.
13. The proprietary and confidential information that Respondent intentionally and improperly downloaded and transmitted was not necessary for Respondent to meet his job requirements and responsibilities.
14. Respondent failed to abide by the conflict-of-interest survey completed at Anthem and breached many of the representations he made therein. Respondent violated Anthem's policies and procedures regarding handling, access, and use of Anthem's confidential, proprietary and/or trade secret information.
15. Respondent shared confidential, proprietary, and/or trade secret information with his brother, Alan Sword, and other producers at Senior Source.
16. The Department has serious consumer protection concerns regarding Respondent's competence and trustworthiness.
17. An emergency exists in that Respondent's continued selling of insurance in the state of Indiana with a valid license places Respondent in a position of trust with Indiana consumers and in control of Indiana consumers' financial circumstances.

18. Indiana Code § 27-1-15.6-12(b)(8) authorizes the Commissioner to suspend an insurance producer for using fraudulent, coercive, or dishonest practices, or demonstrating incompetence, untrustworthiness, or financial irresponsibility in the conduct of business in Indiana or elsewhere.
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21. The Commissioner issued her Order Granting Motions to Renew Emergency Suspension on April 16, 2024, and July 9, 2024.
22. The Enforcement Division previously filed a Motion for Emergency Suspension against Respondent on or about January 16, 2025. The Commissioner granted the Enforcement Division's motion, and issued her Findings of Fact, Conclusions of Law, and Emergency Order on January 16, 2025, which was to expire on April 16, 2025.
23. The Enforcement Division previously filed a Motion for Emergency Suspension against Respondent on or about August 26, 2025, which was set to expire on November 24, 2025.
24. The Commissioner issued an Order Granting Motion to Renew Emergency Suspension on November 18, 2025, which was set to expire on February 16, 2026.

25. The Enforcement Division previously filed a Motion for Emergency Suspension against Respondent on or about February 10, 2026, which is set to expire on May 11, 2026.
26. Indiana Code § 4-21.5-4-5(b) provides that during the pendency of any related proceedings under Indiana Code § 4-21.5-3, the agency responsible for the proceeding may renew the order for successive ninety (90) day periods.
27. It is in the best interest of the public that Respondent's emergency suspension continues until this matter is resolved.
28. Respondent should be required to cease practice as an insurance agent until the Department can be sure that Respondent can practice competently and in an ethically responsible manner.

WHEREFORE, the Enforcement Division requests that the Emergency Order against Respondent be renewed for an additional ninety (90) days, or until a Final Order is issued in this matter, whichever is least, and for all other necessary and proper relief.

/s/ Samantha Aldridge
Samantha Aldridge, Attorney # 35162-49
Indiana Department of Insurance
Enforcement Division
311 W. Washington Street, Suite 103
Indianapolis, Indiana 46204-2787
SAldridge@idoi.in.gov

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I certify that a copy of the foregoing has been served upon the Respondent by United States First Class mail, postage prepaid, the same day as filing.

Curt Moutardier, Attorney for Respondent
400 Pearl Street
Suite 204
New Albany, IN 47150

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

/s/ Samantha Aldridge
Samantha Aldridge, Attorney # 35162-49
Indiana Department of Insurance
Enforcement Division
311 W. Washington Street, Suite 103
Indianapolis, Indiana 46204-2787
saldridge@idoi.in.gov

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BEFORE THE INDIANA
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CAUSE NO.: 22959-AG24-0123-015

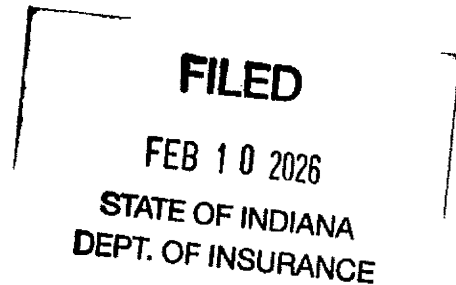
IN THE MATTER OF:)

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

Respondent.

Type of Agency Action: Enforcement)

License Number: 826681)



ORDER GRANTING MOTION TO RENEW EMERGENCY SUSPENSION

Indiana Department of Insurance Commissioner Holly W. Lambert, now being so advised, hereby grants Department's Motion to Renew Emergency Suspension against Respondent for an additional ninety (90) days, pursuant to Indiana Code § 4-21.5-4-5(b), or until a Final Order is issued in this matter, whichever time period is least.

Feb. 10, 2026
Dated

Holly W. Lambert
Holly W. Lambert, Commissioner
Indiana Department of Insurance

Distribution to:

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

Curt Moutardier
400 Pearl Street
Suite 204
New Albany, IN 47150

Samantha Aldridge
Attorney
Indiana Department of
Insurance
311 W Washington St,
Suite 103
Indianapolis, IN 46204

STATE OF INDIANA)
) SS:
COUNTY OF MARION)

BEFORE THE INDIANA
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CAUSE NO.: 22959-AG24-0123-015

IN THE MATTER OF:)

Jason Sword)
13962 Highway 31 N)
Memphis, IN 47143)

Respondent.)

Type of Agency Action: Enforcement)

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FILED

FEB 10 2026

STATE OF INDIANA
DEPT. OF INSURANCE

MOTION FOR RENEWED EMERGENCY SUSPENSION

The Enforcement Division of the Indiana Department of Insurance (“Department”), pursuant to Indiana Code § 4-21.5-4 *et seq.*, files its petition for a renewed emergency suspension against producer Jason Sword (“Respondent”), and states:

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 - d. Respondent's coworker at Anthem would continue to manage Senior Source's business on behalf of Anthem.
9. Respondent completed additional conflict-of-interest surveys throughout his employment at Anthem and agreed to and represented that Respondent would refrain from supporting Alan Sword with events, leads, exchange of referrals, and or sales; and not meet with Alan Sword on a one-on-one basis to discuss Anthem business.

10. On December 18, 2023, the Department was notified by Anthem that between May 24, 2019, and October 25, 2023, Respondent accessed Anthem's confidential, proprietary, and trade secret data without an authorized purpose.
11. The proprietary and confidential information included data regarding Anthem's appointed producers in certain geographical areas, Anthem's national market penetration, sales and growth in comparison to Anthem's competitors, and other data regarding Anthem's sales and products.
12. Respondent intentionally and improperly downloaded this confidential and proprietary information and sent it to himself externally and to others, including Alan Sword.
13. The proprietary and confidential information that Respondent intentionally and improperly downloaded and transmitted was not necessary for Respondent to meet his job requirements and responsibilities.
14. Respondent failed to abide by the conflict-of-interest survey completed at Anthem and breached many of the representations he made therein. Respondent violated Anthem's policies and procedures regarding handling, access, and use of Anthem's confidential, proprietary and/or trade secret information.
15. Respondent shared confidential, proprietary, and/or trade secret information with his brother, Alan Sword, and other producers at Senior Source.
16. The Department has serious consumer protection concerns regarding Respondent's competence and trustworthiness.
17. An emergency exists in that Respondent's continued selling of insurance in the state of Indiana with a valid license places Respondent in a position of trust with Indiana consumers and in control of Indiana consumers' financial circumstances.

18. Indiana Code § 27-1-15.6-12(b)(8) authorizes the Commissioner to suspend an insurance producer for using fraudulent, coercive, or dishonest practices, or demonstrating incompetence, untrustworthiness, or financial irresponsibility in the conduct of business in Indiana or elsewhere.
19. Under Indiana Code § 4-21.5-4-2(a)(1), the Commissioner may, in an emergency, issue orders without notice or an evidentiary proceeding. However, Indiana Code § 4-21.5-4-4 provides that upon issuance of an emergency order, the Respondent may request a hearing as quickly as practicable.
20. The Enforcement Division previously filed a Motion for Emergency Suspension against Respondent on or about January 25, 2024. The Commissioner granted the Enforcement Division's motion, and issued her Findings of Fact, Conclusions of Law, and Emergency Order on January 25, 2024.
21. The Commissioner granted issued Orders Granting Motions to Renew Emergency Suspension on April 16, 2024, and July 9, 2024
22. The Enforcement Division previously filed a Motion for Emergency Suspension against Respondent on or about January 16, 2025. The Commissioner granted the Enforcement Division's motion, and issued her Findings of Fact, Conclusions of Law, and Emergency Order on January 16, 2025, which was to expire on April 16, 2025.
23. The Enforcement Division previously filed a Motion for Emergency Suspension against Respondent on or about August 26, 2025, which was set to expire on November 24, 2025.
24. The Commissioner issued an Order Granting Motion to Renew Emergency Suspension on November 18, 2025, which was set to expire on February 16, 2026.

25. Indiana Code § 4-21.5-4-5(b) provides that during the pendency of any related proceedings under Indiana Code § 4-21.5-3, the agency responsible for the proceeding may renew the order for successive ninety (90) day periods.
26. It is in the best interest of the public that Respondent's emergency suspension continues until this matter is resolved.
27. Respondent should be required to cease practice as an insurance agent until the Department can be sure that Respondent can practice competently and in an ethically responsible manner.

WHEREFORE, the Enforcement Division requests that the Emergency Order against Respondent be renewed for an additional ninety (90) days, or until a Final Order is issued in this matter, whichever is least, and for all other necessary and proper relief.

/s/ Samantha Aldridge
Samantha Aldridge, Attorney # 35162-49
Indiana Department of Insurance
Enforcement Division
311 W. Washington Street, Suite 103
Indianapolis, Indiana 46204-2787
SAldridge@idoi.in.gov

CERTIFICATE OF SERVICE

I certify that a copy of the foregoing has been served upon the Respondent by United States First Class mail, postage prepaid, the same day as filing.

Curt Moutardier, Attorney for Respondent
400 Pearl Street
Suite 204
New Albany, IN 47150

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

/s/ Samantha Aldridge
Samantha Aldridge, Attorney # 35162-49
Indiana Department of Insurance
Enforcement Division
311 W. Washington Street, Suite 103
Indianapolis, Indiana 46204-2787
saldridge@idoi.in.gov

STATE OF INDIANA)
) SS:
COUNTY OF MARION)

BEFORE THE INDIANA
COMMISSIONER OF INSURANCE

CAUSE NO.: 22959-AG24-0123-015

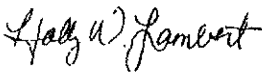
IN THE MATTER OF:)
)
Jason Sword)
13962 Highway 31 N)
Memphis, IN 47143)
)
Respondent.)
)
Type of Agency Action: Enforcement)
)
License Number: 826681)

FILED
NOV 18 2025
STATE OF INDIANA
DEPT. OF INSURANCE

ORDER GRANTING MOTION TO RENEW EMERGENCY SUSPENSION

Indiana Department of Insurance Commissioner Holly W. Lambert, now being so advised, hereby grants Department's Motion to Renew Emergency Suspension against Respondent for an additional ninety (90) days, pursuant to Indiana Code § 4-21.5-4-5(b), or until a Final Order is issued in this matter, whichever time period is least.

11.18.2025
Dated



Holly W. Lambert, Commissioner
Indiana Department of Insurance

Distribution to:

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

Curt Moutardier
400 Pearl Street
Suite 204
New Albany, IN 47150

Samantha Aldridge
Attorney
Indiana Department of
Insurance
311 W Washington St,
Suite 103
Indianapolis, IN 46204

STATE OF INDIANA)
) SS:
COUNTY OF MARION)

BEFORE THE INDIANA
COMMISSIONER OF INSURANCE

CAUSE NO.: 22959-AG24-0123-015

IN THE MATTER OF:)

Jason Sword)
13962 Highway 31 N)
Memphis, IN 47143)

Respondent.)

Type of Agency Action: Enforcement)

License Number: 826681)

FILED

NOV 18 2025

STATE OF INDIANA
DEPT. OF INSURANCE

MOTION FOR RENEWED EMERGENCY SUSPENSION

The Enforcement Division of the Indiana Department of Insurance (“Department”), pursuant to Indiana Code § 4-21.5-4 *et seq.*, files its petition for a renewed emergency suspension against producer Jason Sword (“Respondent”), and states:

1. Respondent is a resident insurance producer holding license number 826681 since July 2, 2012.
2. Respondent’s license expires on October 31, 2026.
3. Respondent’s license is currently suspended on an emergency suspension since August 26, 2025, which is set to expire on November 24, 2025.
4. On December 15, 2023, the Department received notification that Respondent was terminated for cause from Anthem Insurance Companies, Inc., Anthem Life Insurance Company, Inc., Healthkeepers Inc., and Community Insurance Company (hereafter, “Anthem”)

5. Respondent was employed by Anthem from September 4, 2018, to December 15, 2023; Respondent's role at the time of his termination was as Anthem's Director of Sales. In this role, Respondent was responsible for directing and coordinating sales activities for Medicare programs and developing strategies and sales plans for membership growth.
6. Prior to Respondent being employed by Anthem, Respondent was an independent insurance producer working with his brother, Alan Sword, who is a licensed Indiana resident producer, and their agency Senior Source Insurance, LLC ("Senior Source").
7. Alan Sword and Senior Source both held appointments to sell products on behalf of Anthem.
8. At the time of Respondent's hiring at Anthem, Respondent completed a conflict-of-interest survey, representing the following:
 - a. Respondent would not have any contact or make decisions surrounding Anthem business in regard to Senior Source;
 - b. Alan Sword owned 50% of Senior Source;
 - c. Respondent would not sell any products for Senior Source; and
 - d. Respondent's coworker at Anthem would continue to manage Senior Source's business on behalf of Anthem.
9. Respondent completed additional conflict-of-interest surveys throughout his employment at Anthem and agreed to and represented that Respondent would refrain from supporting Alan Sword with events, leads, exchange of referrals, and or sales; and not meet with Alan Sword on a one-on-one basis to discuss Anthem business.

10. On December 18, 2023, the Department was notified by Anthem that between May 24, 2019, and October 25, 2023, Respondent accessed Anthem's confidential, proprietary, and trade secret data without an authorized purpose.
11. The proprietary and confidential information included data regarding Anthem's appointed producers in certain geographical areas, Anthem's national market penetration, sales and growth in comparison to Anthem's competitors, and other data regarding Anthem's sales and products.
12. Respondent intentionally and improperly downloaded this confidential and proprietary information and sent it to himself externally and to others, including Alan Sword.
13. The proprietary and confidential information that Respondent intentionally and improperly downloaded and transmitted was not necessary for Respondent to meet his job requirements and responsibilities.
14. Respondent failed to abide by the conflict-of-interest survey completed at Anthem and breached many of the representations he made therein. Respondent violated Anthem's policies and procedures regarding handling, access, and use of Anthem's confidential, proprietary and/or trade secret information.
15. Respondent shared confidential, proprietary, and/or trade secret information with his brother, Alan Sword, and other producers at Senior Source.
16. The Department has serious consumer protection concerns regarding Respondent's competence and trustworthiness.
17. An emergency exists in that Respondent's continued selling of insurance in the state of Indiana with a valid license places Respondent in a position of trust with Indiana consumers and in control of Indiana consumers' financial circumstances.

18. Indiana Code § 27-1-15.6-12(b)(8) authorizes the Commissioner to suspend an insurance producer for using fraudulent, coercive, or dishonest practices, or demonstrating incompetence, untrustworthiness, or financial irresponsibility in the conduct of business in Indiana or elsewhere.
19. Under Indiana Code § 4-21.5-4-2(a)(1), the Commissioner may, in an emergency, issue orders without notice or an evidentiary proceeding. However, Indiana Code § 4-21.5-4-4 provides that upon issuance of an emergency order, the Respondent may request a hearing as quickly as practicable.
20. The Enforcement Division previously filed a Motion for Emergency Suspension against Respondent on or about January 25, 2024. The Commissioner granted the Enforcement Division's motion, and issued her Findings of Fact, Conclusions of Law, and Emergency Order on January 25, 2024, which was to expire on April 24, 2024.
21. The Enforcement Division previously filed a Motion to Renew Emergency Suspension on or about April 15, 2024. The Commissioner granted the Enforcement Division's motion and issued an Order Granting Motion to Renew Emergency Suspension on April 16, 2024, which was to expire on July 15, 2024.
22. The Enforcement Division previously filed a Motion to Renew Emergency Suspension on or about July 8, 2024. The Commissioner granted the Enforcement Division's motions and issued an Order Granting Motion to Renew Emergency Suspension on July 9, 2024, which was set to expire on October 7, 2024.
23. The Enforcement Division previously filed a Motion for Emergency Suspension against Respondent on or about January 16, 2025. The Commissioner granted the

Enforcement Division's motion, and issued her Findings of Fact, Conclusions of Law, and Emergency Order on January 16, 2025, which was to expire on April 16, 2025.

24. Indiana Code § 4-21.5-4-5(b) provides that during the pendency of any related proceedings under Indiana Code § 4-21.5-3, the agency responsible for the proceeding may renew the order for successive ninety (90) day periods.

25. It is in the best interest of the public that Respondent's emergency suspension continues until this matter can be resolved.

26. Respondent should be required to cease practice as an insurance agent until the Department can be sure that Respondent can practice competently and in an ethically responsible manner.

WHEREFORE, the Enforcement Division requests that the Emergency Order against Respondent be renewed for an additional ninety (90) days, or until a Final Order is issued in this matter, whichever is least, and for all other necessary and proper relief.

/s/ Samantha Aldridge
Samantha Aldridge, Attorney # 35162-49
Indiana Department of Insurance
Enforcement Division
311 W. Washington Street, Suite 103
Indianapolis, Indiana 46204-2787
SAldridge@idoi.in.gov

CERTIFICATE OF SERVICE

I certify that a copy of the foregoing has been served upon the Respondent by United States First Class mail, postage prepaid, the same day as filing.

Curt Moutardier, Attorney for Respondent
400 Pearl Street
Suite 204
New Albany, IN 47150

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

/s/ Samantha Aldridge
Samantha Aldridge, Attorney # 35162-49
Indiana Department of Insurance
Enforcement Division
311 W. Washington Street, Suite 103
Indianapolis, Indiana 46204-2787
saldridge@idoi.in.gov

STATE OF INDIANA)
) SS:
COUNTY OF MARION)

BEFORE THE INDIANA
COMMISSIONER OF INSURANCE

CAUSE NO.: 22959-AG24-0123-015

IN THE MATTER OF:

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

Respondent.

Type of Agency Action: Enforcement

License Number: 826681

FILED

AUG 26 2025

STATE OF INDIANA
DEPT. OF INSURANCE

**FINDINGS OF FACT, CONCLUSIONS OF LAW,
AND EMERGENCY ORDER**

The Commissioner of the Indiana Department of Insurance ("Commissioner"), being duly advised, now issues the Findings of Fact, Conclusions of Law, and Emergency Order:

FINDINGS OF FACT

1. Jason Sword ("Respondent") is a licensed resident insurance producer holding license number 826681 since July 2, 2012.
2. On December 15, 2023, the Indiana Department of Insurance ("Department") received notification that Respondent was terminated for cause from Anthem Insurance Companies, Inc., Anthem Life Insurance Company, Inc., Healthkeepers Inc., and Community Insurance Company (hereafter, "Anthem").
3. Respondent was employed by Anthem from September 4, 2018, to December 15, 2023; Respondent's role at the time of his termination was as Anthem's Director of Sales.

4. Prior to Respondent being employed by Anthem, Respondent was an independent insurance producer working with his brother, Alan Sword, who is a licensed Indiana resident producer, and their agency, Senior Source Insurance, LLC (“Senior Source”).
5. At the time of Respondent’s hiring at Anthem, Respondent completed a conflict-of-interest survey, in which Respondent represented the following:
 - a. Respondent would not have any contact or make decisions surrounding Anthem business in regard to Senior Source;
 - b. Respondent’s brother, Alan Sword, owned 50% of Senior Source;
 - c. Respondent would not sell any products for Senior Source; and
 - d. Respondent’s coworker at Anthem would continue to manage Senior Source’s business on behalf of Anthem.
6. Respondent completed additional conflict-of-interest surveys throughout his employment at Anthem, and agreed to and represented that Respondent would refrain from supporting Alan Sword with events, leads, exchange of referrals, and or sales; and not meet with Alan Sword on a one-on-one basis to discuss Anthem business.
7. Between May 24, 2019, and October 25, 2023, Respondent accessed Anthem’s confidential, proprietary, and trade secret data without an authorized purpose.
8. Respondent intentionally and improperly downloaded this confidential, proprietary and trade secret data and sent it to himself externally and to others, including Alan Sword.
9. The proprietary, confidential and secret data that Respondent intentionally and improperly downloaded and transmitted was not necessary for Respondent to meet his job requirements and responsibilities.

10. Respondent failed to abide by the conflict-of-interest survey completed at Anthem and breached many of the representations he made therein. Respondent violated Anthem's policies and procedures regarding handling, accessing, and using Anthem's confidential, proprietary and/or trade secret information.
11. Respondent shared proprietary, confidential, and/or trade secret information with Alan Sword and other producers at Senior Source.
12. On July 9, 2024, the Department filed its Statement of Charges against Respondent seeking permanent revocation of Respondent's resident producer license.

CONCLUSIONS OF LAW

1. An emergency exists such that an emergency order is appropriate under Indiana Code § 4-21.5-4-1, in that Respondent's continued selling of insurance in the state of Indiana with a valid license places Respondent in a position of trust with Indiana consumers and in control of Indiana consumers' financial circumstances.
2. Indiana Code § 27-1-15.6-12(b)(8) authorizes the Commissioner to suspend an insurance producer's license for using fraudulent, coercive, or dishonest practices, or demonstrating incompetence, untrustworthiness, or financial irresponsibility in the conduct of business in Indiana or elsewhere.
3. This Emergency Order is issued pursuant to Indiana Code § 4-21.5-4-2(a)(1).

ORDER

With the Findings of Fact and Conclusions of Law, as stated above, the Commissioner now orders:

1. Jason Sword's Indiana resident producer license # 826681 is hereby immediately suspended for ninety (90) days, renewable as necessary per Indiana Code §4-21.5-4-5, during the pendency of the related proceedings.

Under Indiana Code § 4-21.5-4-3, this Emergency Order is effective when issued. **Respondent has the right to request a hearing on this Emergency Order by filing a request for a hearing with the Department**, and if requested, an evidentiary hearing will be set on the matter as soon as practicable.

Dated

8-26-2025



Holly W. Lambert, Commissioner
Indiana Department of Insurance

Distribution to:

Samantha Aldridge, Attorney
Indiana Department of Insurance
311 W Washington St, Suite 103
Indianapolis, IN 46204

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

STATE OF INDIANA)
) SS:
COUNTY OF MARION)

BEFORE THE INDIANA
COMMISSIONER OF INSURANCE

CAUSE NO.: 22959-AG24-0123-015

IN THE MATTER OF:

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

Respondent.

Type of Agency Action: Enforcement

License Number: 826681

FILED

AUG 26 2025

STATE OF INDIANA
DEPT. OF INSURANCE

MOTION FOR EMERGENCY SUSPENSION

The Enforcement Division of the Indiana Department of Insurance ("Department"), pursuant to Indiana Code § 4-21.5-4 *et seq.*, files its petition for emergency suspension against agent Jason Sword ("Respondent"), and states:

1. Respondent is a resident insurance producer holding license number 826681 since July 2, 2012.
2. Respondent's license expires on October 31, 2026.
3. Respondent's license was suspended on an emergency basis for ninety (90) days effective January 16, 2025.
4. Respondent's license was suspended on an emergency basis for ninety (90) days effective January 25, 2024; and renewed on April 14, 2024, and July 9, 2024, each for an additional ninety (90) days.
5. On December 15, 2023, the Department received notification that Respondent was terminated for cause from Anthem Insurance Companies, Inc., Anthem Life Insurance

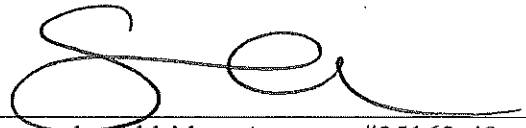
Company, Inc., Healthkeepers Inc., and Community Insurance Company (hereafter, "Anthem").

6. Respondent was employed by Anthem from September 4, 2018, to December 15, 2023; Respondent's role at the time of his termination was as Anthem's Director of Sales. In this role, Respondent was responsible for directing and coordinating sales activities for Medicare programs and developing strategies and sales plans for membership growth.
7. Prior to Respondent being employed by Anthem, Respondent was an independent insurance producer working with his brother, Alan Sword, who is a licensed Indiana resident producer, and their agency Senior Source Insurance, LLC ("Senior Source").
8. Alan and Senior Source both held appointments to sell products on behalf of Anthem.
9. At the time of Respondent's hiring at Anthem, Respondent completed a conflict-of-interest survey, representing the following:
 - a. Respondent would not have any contact or make decisions surrounding Anthem business in regard to Senior Source;
 - b. Respondent's brother, Alan Sword owned 50% of Senior Source;
 - c. Respondent would not sell any products for Senior Source; and
 - d. Respondent's coworker at Anthem would continue to manage Senior Source's business on behalf of Anthem.
10. Respondent completed additional conflict-of-interest surveys throughout his employment at Anthem in which Respondent agreed to and represented Respondent would refrain from supporting Alan with events, leads, exchange of referrals, and or sales; and not meet with Alan on a one-on-one basis to discuss Anthem business.

11. On December 18, 2023, the Department was notified by Anthem that between May 24, 2019, and October 25, 2023, Respondent accessed Anthem's confidential, proprietary, and trade secret data without an authorized purpose.
12. The proprietary and confidential information included data regarding Anthem's appointed producers in certain geographical areas, Anthem's national market penetration, sales and growth in comparison to Anthem's competitors, and other data regarding Anthem's sales and products.
13. Respondent intentionally and improperly downloaded this confidential and proprietary information and sent it to himself externally and to others, including Alan Sword.
14. The proprietary and confidential information Respondent intentionally and improperly downloaded and transmitted was not necessary for Respondent to meet his job requirements and responsibilities.
15. Respondent failed to abide by the conflict-of-interest survey completed at Anthem and breached representations made therein. Respondent violated Anthem's policies and procedures regarding handling, access, and use of Anthem's confidential, proprietary and/or trade secret information.
16. Respondent shared confidential, proprietary, and/or trade secret information with his brother, Alan Sword, and other producers at Senior Source.
17. On July 9, 2024, the Department filed its Statement of Charges against Respondent seeking permanent revocation of Respondent's resident producer license.
18. The Department has serious consumer protection concerns regarding Respondent's competence and trustworthiness.

19. An emergency exists in that Respondent's continued selling of insurance in the state of Indiana with a valid license places Respondent in a position of trust with Indiana consumers and in control of Indiana consumers' financial circumstances.
20. Indiana Code § 27-1-15.6-12(b)(8) authorizes the Commissioner to suspend an insurance producer for using fraudulent, coercive, or dishonest practices, or demonstrating incompetence, untrustworthiness, or financial irresponsibility in the conduct of business in Indiana or elsewhere.
21. Under Indiana Code § 4-21.5-4-2(a)(1), the Commissioner may, in an emergency, issue orders without notice or an evidentiary proceeding. However, Indiana Code § 4-21.5-4-4 provides that upon issuance of an emergency order, the Respondent may request a hearing as quickly as practicable.
22. Respondent Should be required to cease practice as an insurance agent until the Department can be sure that Respondent can practice competently and in an ethically responsible manner.

WHEREFORE, the Enforcement Division requests the Department issue an order suspending the insurance license of Jason Sword under Indiana Code § 4-21.5-4-2, and for all other necessary and proper relief.

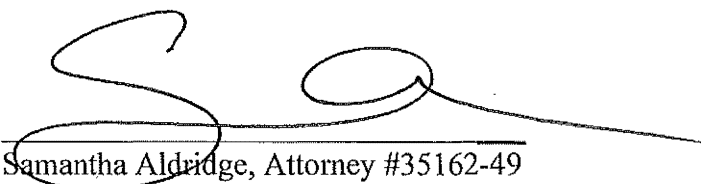
A handwritten signature in black ink, appearing to read 'S. Aldridge', written over a horizontal line.

Samantha Aldridge, Attorney #35162-49
Indiana Department of Insurance
311 West Washington Street
Indianapolis, IN 46204

CERTIFICATE OF SERVICE

I certify that a copy of the foregoing has been served upon counsel for Respondent via electronic mail, the same day as filing.

Jeffrey L. Hansford/Curtis P. Moutardier
400 Pearl St., Suite 204
New Albany, Indiana 47150
jhansford@bsg-in.com
cmoutardier@bsg-in.com



Samantha Aldridge, Attorney #35162-49

STATE OF INDIANA)
) SS:
COUNTY OF MARION)

BEFORE THE INDIANA
COMMISSIONER OF INSURANCE

CAUSE NO.: 22959-AG24-0123-015

IN THE MATTER OF:)
)
Jason Sword)
13962 Highway 31 N)
Memphis, IN 47143)
)
Respondent.)
)
Type of Agency Action: Enforcement)
)
License Number: 826681)

FILED

JAN 16 2025

STATE OF INDIANA
DEPT. OF INSURANCE

**FINDINGS OF FACT, CONCLUSIONS OF LAW,
AND EMERGENCY ORDER**

The Commissioner of the Indiana Department of Insurance (“Commissioner”), being duly advised,
now issues the Findings of Fact, Conclusions of Law, and Emergency Order:

FINDINGS OF FACT

1. Jason Sword (“Respondent”) is a licensed resident insurance producer holding license number 826681 since July 2, 2012.
2. On December 15, 2023, the Indiana Department of Insurance (“Department”) received notification that Respondent was terminated for cause from Anthem Insurance Companies, Inc., Anthem Life Insurance Company, Inc., Healthkeepers Inc., and Community Insurance Company (hereafter, “Anthem”).
3. Respondent was employed by Anthem from September 4, 2018, to December 15, 2023; Respondent’s role at the time of his termination was as Anthem’s Director of Sales.

4. Prior to Respondent being employed by Anthem, Respondent was an independent insurance producer working with his brother, Alan Sword, who is a licensed Indiana resident producer, and their agency, Senior Source Insurance, LLC (“Senior Source”).
5. At the time of Respondent’s hiring at Anthem, Respondent completed a conflict-of-interest survey, and represented the following:
 - a. Respondent would not have any contact or make decisions surrounding Anthem business in regard to Senior Source;
 - b. Respondent’s brother, Alan Sword, owned 50% of Senior Source;
 - c. Respondent would not sell any products for Senior Source; and
 - d. Respondent’s coworker at Anthem would continue to manage Senior Source’s business on behalf of Anthem.
6. Respondent completed additional conflict-of-interest surveys throughout his employment at Anthem, and agreed to and represented that Respondent would refrain from supporting Alan Sword with events, leads, exchange of referrals, and or sales; and not meet with Alan Sword on a one-on-one basis to discuss Anthem business.
7. Between May 24, 2019, and October 25, 2023, Respondent accessed Anthem’s confidential, proprietary, and trade secret data without an authorized purpose.
8. Respondent intentionally and improperly downloaded this confidential, proprietary and trade secret data and sent it to himself externally and to others, including Alan Sword.
9. The proprietary, confidential and secret data that Respondent intentionally and improperly downloaded and transmitted was not necessary for Respondent to meet his job requirements and responsibilities.

10. Respondent failed to abide by the conflict-of-interest survey completed at Anthem and breached many of the representations he made therein. Respondent violated Anthem's policies and procedures regarding handling, accessing, and using Anthem's confidential, proprietary and/or trade secret information.
11. Respondent shared proprietary, confidential, and/or trade secret information with Alan Sword and other producers at Senior Source.

CONCLUSIONS OF LAW

1. An emergency exists such that an emergency order is appropriate under Indiana Code § 4-21.5-4-1, in that Respondent's continued selling of insurance in the state of Indiana with a valid license places Respondent in a position of trust with Indiana consumers and in control of Indiana consumers' financial circumstances.
2. Indiana Code § 27-1-15.6-12(b)(8) authorizes the Commissioner to suspend an insurance producer's license for using fraudulent, coercive, or dishonest practices, or demonstrating incompetence, untrustworthiness, or financial irresponsibility in the conduct of business in Indiana or elsewhere.
3. This Emergency Order is issued pursuant to Indiana Code § 4-21.5-4-2(a)(1).

ORDER

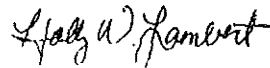
With the Findings of Fact and Conclusions of Law, as stated above, the Commissioner now orders:

1. Jason Sword's Indiana resident producer license # 826681 is hereby immediately suspended for ninety (90) days, renewable as necessary per Indiana Code §4-21.5-4-5..

Under Indiana Code § 4-21.5-4-3, this Emergency Order is effective when issued. **Respondent has the right to request a hearing on this Emergency Order by filing a request for a hearing with the Department**, and if requested, an evidentiary hearing will be set on the matter as soon as practicable.

01.16.2025

Dated



Holly W. Lambert, Commissioner
Indiana Department of Insurance

Distribution to:

Samantha Aldridge, Attorney
Indiana Department of Insurance
311 W Washington St, Suite 103
Indianapolis, IN 46204

Jeffrey L. Hansford/Curtis P. Moutardier
400 Pearl St., Suite 204
New Albany, IN 47150
jhansford@bsg-in.com
cmoutardier@bsg-in.com

STATE OF INDIANA)
) SS:
COUNTY OF MARION)

BEFORE THE INDIANA
COMMISSIONER OF INSURANCE

CAUSE NO.: 22959-AG24-0123-015

IN THE MATTER OF:)

Jason Sword)
13962 Highway 31 N)
Memphis, IN 47143)

Respondent.)

Type of Agency Action: Enforcement)

License Number: 826681)

FILED

JAN 16 2025

STATE OF INDIANA
DEPT. OF INSURANCE

MOTION FOR EMERGENCY SUSPENSION

The Enforcement Division of the Indiana Department of Insurance (“Department”), pursuant to Indiana Code § 4-21.5-4 *et seq.*, files its petition for emergency suspension against agent Jason Sword (“Respondent”), and states:

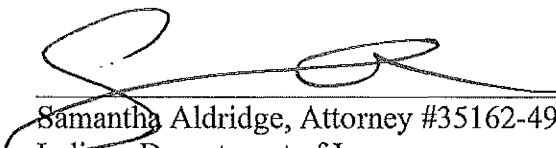
1. Respondent is a resident insurance producer holding license number 826681 since July 2, 2012.
2. Respondent’s license expires on October 31, 2026.
3. Respondent’s license was suspended on an emergency basis effective April 16, 2024 and renewed for an additional ninety (90) days effective July 9, 2024.
4. On December 15, 2023, the Department received notification that Respondent was terminated for cause from Anthem Insurance Companies, Inc., Anthem Life Insurance Company, Inc., Healthkeepers Inc., and Community Insurance Company (hereafter, “Anthem”).

5. Respondent was employed by Anthem from September 4, 2018, to December 15, 2023; Respondent's role at the time of his termination was as Anthem's Director of Sales. In this role, Respondent was responsible for directing and coordinating sales activities for Medicare programs and developing strategies and sales plans for membership growth.
6. Prior to Respondent being employed by Anthem, Respondent was an independent insurance producer working with his brother, Alan Sword, who is a licensed Indiana resident producer, and their agency Senior Source Insurance, LLC ("Senior Source").
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 - a. Respondent would not have any contact or make decisions surrounding Anthem business in regard to Senior Source;
 - b. Respondent's brother, Alan Sword owned 50% of Senior Source;
 - c. Respondent would not sell any products for Senior Source; and
 - d. Respondent's coworker at Anthem would continue to manage Senior Source's business on behalf of Anthem.
9. Respondent completed additional conflict-of-interest surveys throughout his employment at Anthem, and agreed to and represented that Respondent would refrain from supporting Alan with events, leads, exchange of referrals, and or sales; and not meet with Alan on a one-on-one basis to discuss Anthem business.
10. On December 18, 2023, the Department was notified by Anthem that between May 24, 2019, and October 25, 2023, Respondent accessed Anthem's confidential, proprietary, and trade secret data without an authorized purpose.

11. The proprietary and confidential information included data regarding Anthem's appointed producers in certain geographical areas, Anthem's national market penetration, sales and growth in comparison to Anthem's competitors, and other data regarding Anthem's sales and products.
12. Respondent intentionally and improperly downloaded this confidential and proprietary information and sent it to himself externally and to others, including Alan Sword.
13. The proprietary and confidential information that Respondent intentionally and improperly downloaded and transmitted was not necessary for Respondent to meet his job requirements and responsibilities.
14. Respondent failed to abide by the conflict-of-interest survey completed at Anthem and breached representations made therein. Respondent violated Anthem's policies and procedures regarding handling, access, and use of Anthem's confidential, proprietary and/or trade secret information.
15. Respondent shared confidential, proprietary, and/or trade secret information with his brother, Alan Sword, and other producers at Senior Source.
16. On July 9, 2024, the Department filed its Statement of Charges against Respondent seeking permanent revocation of Respondent's resident producer license
17. The Department has serious consumer protection concerns regarding Respondent's competence and trustworthiness.
18. An emergency exists in that Respondent's continued selling of insurance in the state of Indiana with a valid license places Respondent in a position of trust with Indiana consumers and in control of Indiana consumers' financial circumstances.

19. Indiana Code § 27-1-15.6-12(b)(8) authorizes the Commissioner to suspend an insurance producer for using fraudulent, coercive, or dishonest practices, or demonstrating incompetence, untrustworthiness, or financial irresponsibility in the conduct of business in Indiana or elsewhere.
20. Under Indiana Code § 4-21.5-4-2(a)(1), the Commissioner may, in an emergency, issue orders without notice or an evidentiary proceeding. However, Indiana Code § 4-21.5-4-4 provides that upon issuance of an emergency order, the Respondent may request a hearing as quickly as practicable.
21. Respondent Should be required to cease practice as an insurance agent until the Department can be sure that Respondent can practice competently and in an ethically responsible manner.

WHEREFORE, the Enforcement Division requests the Department issue an order suspending the insurance license of Jason Sword under Indiana Code § 4-21.5-4-2, and for all other necessary and proper relief.

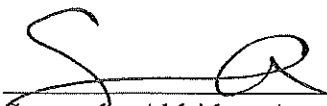


Samantha Aldridge, Attorney #35162-49
Indiana Department of Insurance
311 West Washington Street
Indianapolis, IN 46204

CERTIFICATE OF SERVICE

I certify that a copy of the foregoing has been served upon counsel for Respondent via electronic mail, the same day as filing.

Jeffrey L. Hansford/Curtis P. Moutardier
400 Pearl St., Suite 204
New Albany, Indiana 47150
jhansford@bsg-in.com
cmoutardier@bsg-in.com



Samantha Aldridge, Attorney #35162-49

STATE OF INDIANA)
) SS:
COUNTY OF MARION)

BEFORE THE INDIANA
COMMISSIONER OF INSURANCE

CAUSE NO.: 22959-AG24-0123-015

IN THE MATTER OF:)

Jason Sword)
13962 Highway 31 N)
Memphis, IN 47143)

Respondent.)

Type of Agency Action: Enforcement)

License Number: 826681)

FILED

JUL 09 2024

STATE OF INDIANA
DEPT. OF INSURANCE

ORDER GRANTING MOTION TO
RENEW EMERGENCY SUPENSION

Indiana Department of Insurance Commissioner Amy L. Beard, now being so advised, hereby grants Department's Motion to Renew Emergency Suspension against Respondent for an additional ninety (90) days, pursuant to Indiana Code § 4-21.5-4-5(b), or until a Final Order is issued in this matter, whichever time period is least.

7/9/24
Date Signed

Amy L. Beard
Amy L. Beard, Commissioner
Indiana Department of Insurance

Distribution to:

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

Samantha Aldridge, Attorney
ATTN: Sara Tolliver, Sr. Investigator
Indiana Department of Insurance
311 W. Washington St. Suite 103
Indianapolis, IN 46204-2787

STATE OF INDIANA)
) SS:
COUNTY OF MARION)

BEFORE THE INDIANA
COMMISSIONER OF INSURANCE

CAUSE NO.: 22959-AG24-0123-015

IN THE MATTER OF:)

Jason Sword)
13962 Highway 31 N)
Memphis, IN 47143)

Respondent.)

Type of Agency Action: Enforcement)

License Number: 826681)

FILED

JUL 09 2024

STATE OF INDIANA
DEPT. OF INSURANCE

MOTION FOR RENEWED EMERGENCY SUSPENSION

The Enforcement Division of the Indiana Department of Insurance (“Enforcement Division”), pursuant to Indiana Code § 4-21.5-4 *et seq.*, files its petition for a renewed emergency suspension against producer Jason Sword (“Respondent”), and states:

1. Respondent is a resident insurance producer holding license number 826681 since July 2, 2012.
2. Respondent’s license is currently on emergency suspension, since January 25, 2024 and renewed as of April 16, 2024.
3. Respondent’s license expires October 31, 2024.
4. On December 15, 2023, the Indiana Department of Insurance (“Department”) received notification that Respondent was terminated for cause from Anthem Insurance Companies, Inc., Anthem Life Insurance Company, Inc., Healthkeepers Inc., and Community Insurance Company (hereafter, “Anthem”).
5. Respondent was employed by Anthem from September 4, 2018, to December 15, 2023.

6. Respondent's role at the time of termination was as Anthem's Director of Sales. Respondent was responsible for directing and coordinating sales activities for Medicare programs and developing strategies and sales plans for membership growth.
7. Prior to Respondent employment by Anthem, Respondent was an independent insurance producer working with his brother, Alan Sword, who is a licensed Indiana resident producer, and their agency Senior Source Insurance, LLC ("Senior Source").
8. Alan Sword and Senior Source both held appointments to sell products on behalf of Anthem.
9. At the time of Respondent's hiring at Anthem, Respondent completed a conflict-of-interest survey, representing the following:
 - a. Respondent would not have any contact or make decisions surrounding Anthem business in regard to Senior Source;
 - b. Alan Sword owned 50% of Senior Source;
 - c. Respondent would not sell any products for Senior Source; and
 - d. Respondent's coworker at Anthem would continue to manage Senior Source's business on behalf of Anthem.
10. Respondent completed additional conflict-of-interest surveys throughout his employment at Anthem, and agreed to and represented that Respondent would refrain from supporting Alan Sword with events, leads, exchange of referrals, and or sales; and not meet with Alan Sword on a one-on-one basis to discuss Anthem business.
11. On December 18, 2023, the Department was notified by Anthem that between May 24, 2019, and October 25, 2023, Respondent accessed Anthem's confidential, proprietary, and trade secret data without an authorized purpose.

12. The proprietary and confidential information included data regarding Anthem's appointed producers in certain geographical areas, Anthem's national market penetration, sales and growth in comparison to Anthem's competitors, and other data regarding Anthem's sales and products.
13. Respondent intentionally and improperly downloaded this confidential and proprietary information and sent it to himself externally and to others, including Alan Sword.
14. The proprietary and confidential information that Respondent intentionally and improperly downloaded and transmitted was not necessary for Respondent to meet his job requirements and responsibilities.
15. Respondent failed to abide by the conflict-of-interest survey completed at Anthem and breached many of the representations he made therein. Respondent violated Anthem's policies and procedures regarding handling, access, and use of Anthem's confidential, proprietary and/or trade secret information.
16. Respondent shared confidential, proprietary, and/or trade secret information with his brother, Alan Sword, and other producers at Senior Source.
17. The Department has serious consumer protection concerns regarding Respondent's competence and trustworthiness.
18. An emergency exists in that Respondent's continued selling of insurance in the state of Indiana with a valid license places Respondent in a position of trust with Indiana consumers and in control of Indiana consumers' financial circumstances.
19. Indiana Code § 27-1-15.6-12(b)(8) authorizes the Commissioner to suspend an insurance producer for using fraudulent, coercive, or dishonest practices, or

demonstrating incompetence, untrustworthiness, or financial irresponsibility in the conduct of business in Indiana or elsewhere.

20. Under Indiana Code § 4-21.5-4-2(a)(1), the Commissioner may, in an emergency, issue orders without notice or an evidentiary proceeding. However, Indiana Code § 4-21.5-4-4 provides that upon issuance of an emergency order, the Respondent may request a hearing as quickly as practicable.

21. The Enforcement Division previously filed a Motion for Emergency Suspension against Respondent on or about January 25, 2024. The Commissioner granted the Enforcement Division's motion, and issued her Findings of Fact, Conclusions of Law, and Emergency Order on January 25, 2024.

22. The Enforcement Division previously filed a Motion to Renew Emergency Suspension on or about April 15, 2024. The Commissioner granted the Enforcement Division's motion and issued an Order Granting Motion to Renew Emergency Suspension on April 16, 2024. The Enforcement Division believed it necessary to renew the emergency suspension against Respondent.

23. On July 9, 2024, the Enforcement Division filed its Statement of Charges against Respondent seeking permanent revocation of Respondent's resident insurance producer license.

24. Indiana Code § 4-21.5-4-5(b) provides that during the pendency of any related proceedings under Indiana Code § 4-21.5-3, the agency responsible for the proceeding may renew the order for successive ninety (90) day periods.

25. It is in the best interest of the public that Respondent's emergency suspension continues until this matter can be resolved.

26. Respondent should be required to cease practice as an insurance agent until the Department can be sure that Respondent can practice competently and in an ethically responsible manner.

WHEREFORE, the Enforcement Division requests that the Emergency Order against Respondent be renewed for an additional ninety (90) days, or until a Final Order is issued in this matter, whichever is least, and for all other necessary and proper relief.

/s/ Samantha Aldridge
Samantha Aldridge, Attorney # 35162-49
Indiana Department of Insurance
Enforcement Division
311 W. Washington Street, Suite 103
Indianapolis, Indiana 46204-2787
SAldridge@idoi.in.gov

CERTIFICATE OF SERVICE

I certify that a copy of the foregoing has been served upon the Respondent by United States First Class mail, postage prepaid, the same day as filing.

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

/s/ Samantha Aldridge
Samantha Aldridge, Attorney

STATE OF INDIANA)
) SS:
COUNTY OF MARION)

BEFORE THE INDIANA
COMMISSIONER OF INSURANCE

CAUSE NO.: 22959-AG24-0123-015

IN THE MATTER OF:

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

Respondent.

Type of Agency Action: Enforcement

License Number: 826681

FILED

APR 16 2024

STATE OF INDIANA
DEPT. OF INSURANCE

ORDER GRANTING MOTION TO RENEW EMERGENCY SUSPENSION

Indiana Department of Insurance Commissioner Amy L. Beard, now being so advised, hereby grants Department's Motion to Renew Emergency Suspension against Respondent for an additional ninety (90) days, pursuant to Indiana Code § 4-21.5-4-5(b), or until a Final Order is issued in this matter, whichever time period is least.

4.16.2024
Dated



Amy L. Beard, Commissioner
Indiana Department of Insurance

Distribution to:

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

Joseph Bossinger, Attorney
Indiana Department of Insurance
311 W Washington St, Suite 103
Indianapolis, IN 46204

STATE OF INDIANA)
) SS:
COUNTY OF MARION)

BEFORE THE INDIANA
COMMISSIONER OF INSURANCE

CAUSE NO.: 22959-AG24-0123-015

IN THE MATTER OF:)
)
Jason Sword)
13962 Highway 31 N)
Memphis, IN 47143)
)
Respondent.)
)
Type of Agency Action: Enforcement)
)
License Number: 826681)

FILED

APR 16 2024

STATE OF INDIANA
DEPT. OF INSURANCE

MOTION FOR RENEWED EMERGENCY SUSPENSION

The Enforcement Division of the Indiana Department of Insurance (“Department”), pursuant to Indiana Code § 4-21.5-4 *et seq.*, files its petition for a renewed emergency suspension against producer Jason Sword (“Respondent”), and states:

1. Respondent is a resident insurance producer holding license number 826681 since July 2, 2012.
2. Respondent’s license expires on October 31, 2024.
3. On December 15, 2023, the Department received notification that Respondent was terminated for cause from Anthem Insurance Companies, Inc., Anthem Life Insurance Company, Inc., Healthkeepers Inc., and Community Insurance Company (hereafter, “Anthem”)
4. Respondent was employed by Anthem from September 4, 2018, to December 15, 2023; Respondent’s role at the time of his termination was as Anthem’s Director of Sales. In

- this role, Respondent was responsible for directing and coordinating sales activities for Medicare programs and developing strategies and sales plans for membership growth.
5. Prior to Respondent being employed by Anthem, Respondent was an independent insurance producer working with his brother, Alan Sword, who is a licensed Indiana resident producer, and their agency Senior Source Insurance, LLC (“Senior Source”).
 6. Alan Sword and Senior Source both held appointments to sell products on behalf of Anthem.
 7. At the time of Respondent’s hiring at Anthem, Respondent completed a conflict-of-interest survey, representing the following:
 - a. Respondent would not have any contact or make decisions surrounding Anthem business in regard to Senior Source;
 - b. Alan Sword owned 50% of Senior Source;
 - c. Respondent would not sell any products for Senior Source; and
 - d. Respondent’s coworker at Anthem would continue to manage Senior Source’s business on behalf of Anthem.
 8. Respondent completed additional conflict-of-interest surveys throughout his employment at Anthem, and agreed to and represented that Respondent would refrain from supporting Alan Sword with events, leads, exchange of referrals, and or sales; and not meet with Alan Sword on a one-on-one basis to discuss Anthem business.
 9. On December 18, 2023, the Department was notified by Anthem that between May 24, 2019, and October 25, 2023, Respondent accessed Anthem’s confidential, proprietary, and trade secret data without an authorized purpose.

10. The proprietary and confidential information included data regarding Anthem's appointed producers in certain geographical areas, Anthem's national market penetration, sales and growth in comparison to Anthem's competitors, and other data regarding Anthem's sales and products.
11. Respondent intentionally and improperly downloaded this confidential and proprietary information and sent it to himself externally and to others, including Alan Sword.
12. The proprietary and confidential information that Respondent intentionally and improperly downloaded and transmitted was not necessary for Respondent to meet his job requirements and responsibilities.
13. Respondent failed to abide by the conflict-of-interest survey completed at Anthem and breached many of the representations he made therein. Respondent violated Anthem's policies and procedures regarding handling, access, and use of Anthem's confidential, proprietary and/or trade secret information.
14. Respondent shared confidential, proprietary, and/or trade secret information with his brother, Alan Sword, and other producers at Senior Source.
15. The Department has serious consumer protection concerns regarding Respondent's competence and trustworthiness.
16. An emergency exists in that Respondent's continued selling of insurance in the state of Indiana with a valid license places Respondent in a position of trust with Indiana consumers and in control of Indiana consumers' financial circumstances.
17. Indiana Code § 27-1-15.6-12(b)(8) authorizes the Commissioner to suspend an insurance producer for using fraudulent, coercive, or dishonest practices, or

demonstrating incompetence, untrustworthiness, or financial irresponsibility in the conduct of business in Indiana or elsewhere.

18. Under Indiana Code § 4-21.5-4-2(a)(1), the Commissioner may, in an emergency, issue orders without notice or an evidentiary proceeding. However, Indiana Code § 4-21.5-4-4 provides that upon issuance of an emergency order, the Respondent may request a hearing as quickly as practicable.
19. The Enforcement Division previously filed a Motion for Emergency Suspension against Respondent on or about January 25, 2024. The Commissioner granted the Enforcement Division's motion, and issued her Findings of Fact, Conclusions of Law, and Emergency Order on January 25, 2024, which was to expire on April 24, 2024.
20. The Enforcement Division believed it necessary to renew the emergency suspension against Respondent. On or about April 15, 2024, the Enforcement Division filed a Motion to Renew Emergency Suspension for an additional ninety (90) days.
21. Indiana Code § 4-21.5-4-5(b) provides that during the pendency of any related proceedings under Indiana Code § 4-21.5-3, the agency responsible for the proceeding may renew the order for successive ninety (90) day periods.
22. It is in the best interest of the public that Respondent's emergency suspension continues until this matter can be resolved.
23. Respondent should be required to cease practice as an insurance agent until the Department can be sure that Respondent can practice competently and in an ethically responsible manner.

WHEREFORE, the Enforcement Division requests that the Emergency Order against Respondent be renewed for an additional ninety (90) days, or until a Final Order is issued in this matter, whichever is least, and for all other necessary and proper relief.

/s/ Joseph Bossinger
Joseph Bossinger, Attorney # 35166-49
Indiana Department of Insurance
Enforcement Division
311 W. Washington Street, Suite 103
Indianapolis, Indiana 46204-2787
jbossinger@idoi.in.gov
Telephone: (317) 232-2417

CERTIFICATE OF SERVICE

I certify that a copy of the foregoing has been served upon the Respondent by United States First Class mail, postage prepaid, the same day as filing.

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

/s/ Joseph Bossinger
Joseph Bossinger, Attorney # 35166-49
Indiana Department of Insurance
Enforcement Division
311 W. Washington Street, Suite 103
Indianapolis, Indiana 46204-2787
jbossinger@idoi.in.gov
Telephone: (317) 232-2417

STATE OF INDIANA)
) SS:
COUNTY OF MARION)

BEFORE THE INDIANA
COMMISSIONER OF INSURANCE

CAUSE NO.: 22959-AG24-0123-015

IN THE MATTER OF:

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

Respondent.

Type of Agency Action: Enforcement

License Number: 826681

FILED

JAN 25 2024

STATE OF INDIANA
DEPT. OF INSURANCE

**FINDINGS OF FACT, CONCLUSIONS OF LAW,
AND EMERGENCY ORDER**

The Commissioner of the Indiana Department of Insurance (“Commissioner”), being duly advised, now issues the Findings of Fact, Conclusions of Law, and Emergency Order:

FINDINGS OF FACT

1. Jason Sword (“Respondent”) is a licensed resident insurance producer holding license number 826681 since July 2, 2012.
2. On December 15, 2023, the Indiana Department of Insurance (“Department”) received notification that Respondent was terminated for cause from Anthem Insurance Companies, Inc., Anthem Life Insurance Company, Inc., Healthkeepers Inc., and Community Insurance Company (hereafter, “Anthem”).
3. Respondent was employed by Anthem from September 4, 2018, to December 15, 2023; Respondent’s role at the time of his termination was as Anthem’s Director of Sales.

4. Prior to Respondent being employed by Anthem, Respondent was an independent insurance producer working with his brother, Alan Sword, who is a licensed Indiana resident producer, and their agency, Senior Source Insurance, LLC ("Senior Source").
5. At the time of Respondent's hiring at Anthem, Respondent completed a conflict-of-interest survey, and represented the following:
 - a. Respondent would not have any contact or make decisions surrounding Anthem business in regard to Senior Source;
 - b. Respondent's brother, Alan Sword, owned 50% of Senior Source;
 - c. Respondent would not sell any products for Senior Source; and
 - d. Respondent's coworker at Anthem would continue to manage Senior Source's business on behalf of Anthem.
6. Respondent completed additional conflict-of-interest surveys throughout his employment at Anthem, and agreed to and represented that Respondent would refrain from supporting Alan Sword with events, leads, exchange of referrals, and or sales; and not meet with Alan Sword on a one-on-one basis to discuss Anthem business.
7. Between May 24, 2019, and October 25, 2023, Respondent accessed Anthem's confidential, proprietary, and trade secret data without an authorized purpose.
8. Respondent intentionally and improperly downloaded this confidential, proprietary and trade secret data and sent it to himself externally and to others, including Alan Sword.
9. The proprietary, confidential and secret data that Respondent intentionally and improperly downloaded and transmitted was not necessary for Respondent to meet his job requirements and responsibilities.

10. Respondent failed to abide by the conflict-of-interest survey completed at Anthem and breached many of the representations he made therein. Respondent violated Anthem's policies and procedures regarding handling, accessing, and using Anthem's confidential, proprietary and/or trade secret information.
11. Respondent shared proprietary, confidential, and/or trade secret information with Alan Sword and other producers at Senior Source.

CONCLUSIONS OF LAW

1. An emergency exists such that an emergency order is appropriate under Indiana Code § 4-21.5-4-1, in that Respondent's continued selling of insurance in the state of Indiana with a valid license places Respondent in a position of trust with Indiana consumers and in control of Indiana consumers' financial circumstances.
2. Indiana Code § 27-1-15.6-12(b)(8) authorizes the Commissioner to suspend an insurance producer's license for using fraudulent, coercive, or dishonest practices, or demonstrating incompetence, untrustworthiness, or financial irresponsibility in the conduct of business in Indiana or elsewhere.
3. This Emergency Order is issued pursuant to Indiana Code § 4-21.5-4-2(a)(1).

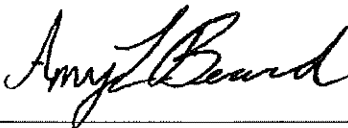
ORDER

With the Findings of Fact and Conclusions of Law, as stated above, the Commissioner now orders:

1. Jason Sword's Indiana resident producer license # 826681 is hereby immediately suspended for ninety (90) days, renewable as necessary per Indiana Code §4-21.5-4-5.

Under Indiana Code § 4-21.5-4-3, this Emergency Order is effective when issued. **Respondent has the right to request a hearing on this Emergency Order by filing a request for a hearing with the Department**, and if requested, an evidentiary hearing will be set on the matter as soon as practicable.

01.25.2024
Dated



Amy L. Beard, Commissioner
Indiana Department of Insurance

Distribution to:

Joseph Bossinger, Attorney
Indiana Department of Insurance
311 W Washington St, Suite 103
Indianapolis, IN 46204

Jason Sword
13962 Highway 31 N
Memphis, IN 47143

STATE OF INDIANA)
) SS:
COUNTY OF MARION)

BEFORE THE INDIANA
COMMISSIONER OF INSURANCE

CAUSE NO.: 22959-AG24-0123-015

IN THE MATTER OF:)
)
Jason Sword)
13962 Highway 31 N)
Memphis, IN 47143)
)
Respondent.)
)
Type of Agency Action: Enforcement)
)
License Number: 826681)

FILED

JAN 25 2024

STATE OF INDIANA
DEPT. OF INSURANCE

MOTION FOR EMERGENCY SUSPENSION

The Enforcement Division of the Indiana Department of Insurance (“Department”), pursuant to Indiana Code § 4-21.5-4 *et seq.*, files its petition for emergency suspension against agent Jason Sword (“Respondent”), and states:

1. Respondent is a resident insurance producer holding license number 826681 since July 2, 2012.
2. Respondent’s license expires on October 31, 2024.
3. On December 15, 2023, the Department received notification that Respondent was terminated for cause from Anthem Insurance Companies, Inc., Anthem Life Insurance Company, Inc., Healthkeepers Inc., and Community Insurance Company (hereafter, “Anthem”)
4. Respondent was employed by Anthem from September 4, 2018, to December 15, 2023; Respondent’s role at the time of his termination was as Anthem’s Director of Sales. In

- this role, Respondent was responsible for directing and coordinating sales activities for Medicare programs and developing strategies and sales plans for membership growth.
5. Prior to Respondent being employed by Anthem, Respondent was an independent insurance producer working with his brother, Alan Sword, who is a licensed Indiana resident producer, and their agency Senior Source Insurance, LLC (“Senior Source”).
 6. Alan and Senior Source both held appointments to sell products on behalf of Anthem.
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 - a. Respondent would not have any contact or make decisions surrounding Anthem business in regard to Senior Source;
 - b. Respondent’s brother, Alan Sword owned 50% of Senior Source;
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 - d. Respondent’s coworker at Anthem would continue to manage Senior Source’s business on behalf of Anthem.
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penetration, sales and growth in comparison to Anthem's competitors, and other data regarding Anthem's sales and products.

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17. Indiana Code § 27-1-15.6-12(b)(8) authorizes the Commissioner to suspend an insurance producer for using fraudulent, coercive, or dishonest practices, or demonstrating incompetence, untrustworthiness, or financial irresponsibility in the conduct of business in Indiana or elsewhere.

18. Under Indiana Code § 4-21.5-4-2(a)(1), the Commissioner may, in an emergency, issue orders without notice or an evidentiary proceeding. However, Indiana Code § 4-21.5-4-4 provides that upon issuance of an emergency order, the Respondent may request a hearing as quickly as practicable.
19. Respondent Should be required to cease practice as an insurance agent until the Department can be sure that Respondent can practice competently and in an ethically responsible manner.

WHEREFORE, the Enforcement Division requests that the Department issue an order suspending the insurance license of Jason Sword under Indiana Code § 4-21.5-4-2, and for all other necessary and proper relief.

A handwritten signature in black ink, appearing to read "Joseph Bossinger", is written over a horizontal line.

Joseph Bossinger, Attorney #35166-49
Indiana Department of Insurance
311 West Washington St
Indianapolis, IN 46204

Certificate of Service

I certify that a copy of the foregoing has been served upon the Respondent by United States First Class mail, postage prepaid, the same day as filing.

Jason Sword
13962 Highway 31 N
Memphis, IN 47143


Joseph Bossinger, Attorney #35166-49
Indiana Department of Insurance
311 W Washington St, Suite 103
Indianapolis, IN 46204