



STATE OF INDIANA

INDIANA
STATE ETHICS COMMISSION

JUL 13 2018

ERIC J. HOLCOMB, GOVERNOR

FILED

Indiana Department of Insurance

Stephen W. Robertson, Commissioner
311 W. Washington Street, Suite 103
Indianapolis, Indiana 46204-2787
Telephone: 317-232-2385
Fax: 317-232-5251
Website: in.gov/idoi

Name of Agency or Office: Indiana Department of Insurance

Name of Recipient: Randall Evans

Title of Recipient: Deputy Commissioner, Agency Services

Brief Description of Item Solicited, Accepted, or Received and approximate value of item:

Vertafore has offered to pay travel, lodging, and meals for Recipient to attend the 2018 Vertafore SIRC Summit, an annual meeting of Vertafore's regulatory clients. The SIRC Summit will be held from July 24 to 26, 2018 in Lansing, Michigan. The theme of this year's SIRC Summit is "Where Are We and What's Next?" and includes networking opportunities with other state regulators; updates from Vertafore on their products and changes being made; presentations from other state departments of insurance; a presentation from a National Association of Insurance Commissioners ("NAIC") representative; and presentations from additional insurance industry members. The approximate value of Donor's gift is \$685.18

Date of Receipt: July 24 – 26, 2018

Name of Donor: Vertafore, Inc.

Donor's Address: 11724 NE 195th Street, Bothell, Washington 98011

Nature of Business Relationship with Agency:

Vertafore develops software used in the insurance industry. Vertafore owns Sircon Corporation ("Sircon"). Sircon has a contract with the IDOI to provide various types of software to the State, including producer licensing, company admissions, and rate and form filings. Sircon also provides online services to the public on behalf of the State, including insurance producer license applications and renewals, and continuing and pre-licensing provider course approval applications.

State Why Acceptance is in the Public Interest:

As Sircon is contracted to provide various types of software services to the IDOI, it is imperative that IDOI staff keep up-to-date with new company and software developments, especially since

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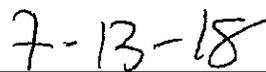
AGENCY SERVICES 317-232-2413 COMPANY COMPLIANCE 317-232-3495 CONSUMER SERVICES 317-232-2395/1-800-622-4461 FINANCIAL SERVICES 317-232-2390 MEDICAL MALPRACTICE 317-232-2402 COMPANY RECORDS 317-232-5692 STATE HEALTH INSURANCE PROGRAM 1-800-452-4800

it is the software that is used by the agency and the public we serve. IDOI staff have previously attended this event with a gift waiver.

It is also in the public interest to develop and maintain good relationships with Sircon representatives in order to keep the lines of communication open to the benefit of all. In addition, Recipient's attendance will allow Recipient the opportunity to connect with insurance regulators from other states. Recipient's attendance will also allow him the opportunity to provide valuable feedback to Vertafore on the company's plans to address, in person, any questions or concerns he may have regarding the products and services Sircon provides to the IDOI. Recipient's attendance at the SIRC Summit helps to achieve all of these important objectives and is in the public interest.



Cathleen Nine-Altevogt, IDOI Ethics Officer



Date
