



New Member Checklist

- All Illinois surplus line policies and premium-bearing endorsements must be filed using the SLAI Electronic Filing System (EFS) **before delivering them to the insured** and must show evidence of filing (SLAI Confirmation #).
- Before filing policies, visit our website (www.slai.org) and click on **Filing Info**, then on **General Filing Info**. READ IT. It's short. If you have any questions, contact us. The EFS is at <https://efile.slai.org>.
- Include your SLAI Member Number on all checks and correspondence sent to the Association. This is NOT the same as your license number or NPN.
- We can't contact you if we don't know where to reach you. **Let us know if your HOME OR WORK ADDRESS or PHONE or EMAIL CHANGES, or if you CHANGE EMPLOYERS.** Licensing administrators should let us know **IMMEDIATELY** if surplus line producers join or leave your firm. You are also required to keep this information up to date in NIPR (www.nipr.com).
- **Tax statements must be sent in to the Department of Insurance (DOI) even if you've had no activity and even if no tax is due.** SLAI sends them out well in advance, but if you haven't received them within two weeks of the due dates, they can be reprinted on the EFS, or you can contact us for a copy. Surplus Line Tax Statements are due twice per year on February 1st and August 1st. Fire Marshal Tax Statements are due annually on February 1st.
- **DO NOT alter your tax forms** when you receive them. CONTACT THE ASSOCIATION if you have any questions.
- DO NOT send any money to the Association or the DOI before you are billed. Policy filings and stamping fee payments are billed monthly and go to the SLAI. Tax statements and tax payments are due twice per year and go to the DOI.
- Give a copy of this checklist to all staff involved in surplus line filings, licensing, taxes and accounting.