

STATE OF ALABAMA
DEPARTMENT OF INSURANCE

PG

Retaliatory Tax Statement

for the Year Ending December 31, _____

INSTRUCTIONS

PENALTIES: Any Company failing to file its Premium Tax Return (even when no tax is due) or failing to pay such taxes on a timely basis shall be subject to a penalty of \$1,000 to \$10,000, to be assessed by the Commissioner.

RETURNS MUST BE RECEIVED BY THE DUE DATE TO BE ACCEPTED AS TIMELY FILED.

Please refer to the NAIC Checklist at <http://www.aldoi.gov/Companies/FilingReqs.aspx> for further instructions.

() Supporting calculations for Retaliatory Statement, i.e. a retaliatory statement from the Insurer's state of domicile should be emailed to premiumtax@insurance.alabama.gov. The name of the company and the year must be stated in the subject line.

() Make checks payable to: Alabama Department of Insurance.

() Please mail Retaliatory Tax Statement and Check to:

POSTAL SERVICE

Alabama Department of Insurance
c/o Compass Bank
P. O. Box 830691
Birmingham, AL 35283-0691

COURIER OR EXPRESS SERVICE

Alabama Department of Insurance
c/o Compass Bank
701 South 32nd Street
Birmingham, AL 35233

NAIC# _____

Name of Company

Company's Mailing Address

Preparer's Name and Title (Print)

Telephone Number

E-Mail Address of Preparer

RETALIATORY COMPUTATION

When by the laws of any other state, the aggregate taxes and fees which are imposed upon Alabama insurers are in excess of the aggregate taxes and fees imposed by Alabama upon similar insurers of such other state, the same taxes and fees imposed by such state shall be imposed by Alabama on the insurers of such other state.

1.	Amount of tax due your state by a similar Alabama insurer	\$ _____	Your state of domicile premium tax rate _____
2.	Annual Statement filing Fee imposed upon a similar Alabama insurer	\$ _____	
3.	License renewal fee due for a similar Alabama insurer	\$ _____	
4.	Other taxes and fees imposed upon a similar Alabama insurer	\$ _____	
5.	TOTAL (lines 1 - 4)	\$ _____	
6.	Total TAXES you owe figured on an Alabama basis	\$ _____	
7.	Total fees you owe figured on an Alabama basis	\$ _____	
8.	TOTAL (lines 6 and 7)	\$ _____	
9.	TOTAL RETALIATORY TAXES DUE (line 5 less line 8, if negative enter zero)	PG--- \$ _____	