



ADMINISTRATIVE RULES OF MONTANA



6.6.8504 FORMS AND MATERIALS FILINGS, APPROVALS AND REVISIONS

- (1) A viatical settlement provider shall file and have approved by the commissioner application forms, contracts and other forms as required by 33-1-501 and 33-20-1308, MCA.
- (2) A viatical settlement provider or broker shall file with the commissioner information brochures, advertising, and other solicitation materials that a provider or broker uses to market viatical settlements to viators or prospective viators in this state before using such materials.
- (3) If a viator, prior to effectuating a viatical settlement, requests any changes to a contract form previously approved by the commissioner, the provider shall file a letter with the commissioner requesting a deviation from the standard contract form. The letter must provide:
 - (a) the name of a viatical settlement provider;
 - (b) that the viator requested substantive revision;
 - (c) the form number of the viatical settlement contract that was originally proposed;
 - (d) the deviations from a standard viatical settlement contract; and
 - (e) that the payment was reasonable under ARM 6.6.8507.
- (4) The provider may not execute a revised viatical settlement contract with a viator until the commissioner has reviewed the revisions and approved the form pursuant to 33-1-501, MCA.

Authorizing statute(s): 33-20-1315, MCA

Implementing statute(s): 33-1-501, 33-20-1308, 33-20-1311, MCA

History: NEW, 2000 MAR p. 3155, Eff. 11/10/00; AMD, 2017 MAR p. 1888, Eff. 10/14/17.