



ADMINISTRATIVE RULES OF MONTANA



6.6.8505 DISCLOSURE

- (1) A disclosure document containing the disclosures required in 33-20-1311, MCA, and this rule, shall be provided when an application for a viatical settlement contract is taken.
- (2) The disclosure document must contain the following language:
 - (a) "All medical, financial, or personal information solicited or obtained by a viatical settlement provider or viatical settlement broker about a viator and insured, including the viator and insured's identity or the identity of family members is confidential."
- (3) The medical, financial, or personal information solicited or obtained by a viatical settlement provider or viatical settlement broker about a viator and insured may not be disclosed in any form to any person, unless disclosure:
 - (a) is necessary to effect the viatical settlement between the viator and the viatical settlement provider; and
 - (b) the viator and insured have provided prior written consent to the disclosure.
- (4) The disclosure shall include advising the viator and insured that the information may be provided to financing entities including individual and institutional purchasers.

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

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

History: NEW, 2000 MAR p. 3155, Eff. 11/10/00; AMD, 2005 MAR p. 71, Eff. 1/14/05; AMD, 2017 MAR p. 1888, Eff. 10/14/17.