



## **Mergers Involving a Pennsylvania Domiciled Fraternal Benefit Society**

The Pennsylvania Insurance Department requires the following documents to process the above request:

40 P.S. Section 991.2425 provides information on the specific materials to be included in the application for the Insurance Commissioner's approval of a merger involving a Pennsylvania domestic Fraternal Benefit Society. Please provide:

1. A certified copy of the written contract containing in full the terms and conditions of the merger, when available.
2. A sworn statement by the president and secretary or corresponding officers of each society showing the financial condition of each society.
3. A certificate of each societies' president and secretary or corresponding officers, verified by their respective oaths, that the merger has been approved by a two-thirds vote of the supreme legislative or governing body of each society.
4. Evidence that at least 60 days prior to the action of the supreme legislative or governing body of each society, the text of the contract has been furnished to all members of each society either by mail or publication in full in the official organ of each society.
5. Pro forma balance sheet of the surviving society immediately after consummation of the merger.
6. A filing fee of \$400, please make the check payable to the "Commonwealth of Pennsylvania."

Please be advised that the filing of the listed materials is not to be construed as approval by the Pennsylvania Insurance Department of the instant transaction. The contemplated transaction requires specific written approval by the Department. Consummation by the parties prior to obtaining such approval may result in the imposition of significant civil penalties.

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