|  |  |  |
| --- | --- | --- |
|  | TABLE OF CONTENTS |  |
|  |  |  |
|  |  | Page |
| Introduction |  |  II |
| Schedule S-1 | Transaction Report | 1 |
| Schedule S-2 | Reconciliation Report | 2 |
| Schedule S-3 | Liability Distribution Report | 3 |
| Schedule S-4 | Endorsement Report | 4 |
| Schedule S-5 | Special Charges and Credits Report | 5 |
| Schedule S-6 | Co-Insurance Report | 6 |
| Table 1 | Minimum Acceptable Content of Basic Statistical Record  | 7 |
| ~~Notes to Table 1~~ |  | ~~9~~ |
| Table 2 | Standard Transaction Codes for Texas Operations | 10 |
| Table 3 | Standard Special Charge and Credit Codes for Texas Operations | 12 |
| Table 4 | Standard Endorsement Codes for Texas Operations | 13  |
| Table 5 | Standard Insured Closing Service Codes for Texas Operations  | 16 |
| Table 6 | Standard Personal Property Title Insurance Transaction Codes for Texas Operations | 17 |
| Table 7 | Standard County Codes for Texas | 19 |

# INTRODUCTION

The Texas Title Insurance Statistical Plan consists of six reporting schedules:

|  |  |
| --- | --- |
| Schedule S-1: | A Transaction Report, which summarizes the revenues generated by each type of policy. |
| Schedule S-2: | A Reconciliation Report, which compares the revenues reported through the Statistical Plan with those reported through the Texas Title Insurance Income Exhibit. |
| Schedule S-3: | A Liability Distribution Report, which presents the distribution of numbers of policies written and total revenue raised according to the liability assumed in the underlying transaction. |
| Schedule S-4: | An Endorsement Report, which summarizes the revenues generated through each endorsement. |
| Schedule S-5: | A Special Charges and Credits Report, which gives an overview of the revenue impact of each special charge or credit. |
| Schedule S-6: | A Co-Insurance Report, which lists for each risk co-insured by the reporting company, the transaction code, the name of each co-insuring company, the policy number of each co-insuring company, the liability assumed by each co-insuring company, and the total liability assumed by all co-insuring companies. |

In order to complete these reporting schedules, underwriting companies will maintain a Basic Statistical Record for each Texas transaction and will develop procedures for summarization of the BSRs according to the formats of Schedules S-1 through S-6.

The data items included in a BSR are set forth in Table 1 ~~and its accompanying notes~~. Standard Texas codes for Transaction Type (BSR data item #4), Special Charge and Credit Types (BSR item #8), Endorsement Types (BSR item #10), and County of Property (BSR item ~~#13~~ #14) are presented in Tables 2 through 7. Numbers in square brackets ([ ]) on the Reporting Schedules refer to BSR data item #s.

Co-insurance transactions included on schedules S-1 through S-5 should reflect experience of the reporting company only. A co-insurance policy is considered to be one transaction.

# SCHEDULE S-1

## TRANSACTION REPORT

Company Experience Period

|  |  |  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- | --- | --- |
|  | Transaction Type[4] | Number of Transactions | Total Liability[5] | Non-Basic Rate Liability[6] | Gross Rate Excluding Special Charges/Credits and Endorsements[7] | Special Charges and Credits[9] | Endorsements[11] | Total Gross Revenue | Agents Commissions /Retentions~~[15]~~ [16] |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |
|  |  |  |  |  |  |  |  |  |  |

**\*NOTE: Special charges must be treated as positive numbers, while special credits must be treated as negative numbers, so that the table entries in this column represent special charges net of special credits and the sum of the revenue component columns equals gross revenue received.**

# SCHEDULE S-2

Company \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Experience Period \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## RECONCILIATION REPORT

|  |  |  |
| --- | --- | --- |
| 1. | Gross Revenue per Statistical Plan([7] + [9] + [11]) |  |
| 2. | Adjustments (itemize) |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| 3. | Gross Revenue per Texas Title Insurance Income Exhibit (sum of line 7 column G and line 20, columns A, B, and D) |  |

# SCHEDULE S-3

Company \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Experience Period \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## LIABILITY DISTRIBUTION REPORT

Note: Prepare a separate sheet for each transaction type and one sheet for all transaction types combined.

Transaction Type \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |  |
| --- | --- | --- |
| Liability Range($000) [5] |  |  |
| MoreThan | But No More Than | Number ofTransactions | Gross Revenue ExcludingSpecial Charges and CreditsAnd Endorsements [7] |
| 0 |  |  |
| 0 - 4.5 |  |  |
| 4.5 - 10 |  |  |
| 10 - 20 |  |  |
| 20- 30 |  |  |
| 30- 40 |  |  |
| 40 - 50 |  |  |
| 50 - 60 |  |  |
| 60 - 70 |  |  |
| 70 - 80 |  |  |
| 80 - 90 |  |  |
| 90 - 100 |  |  |
| 100 - 200 |  |  |
| 200 - 300 |  |  |
| 300 - 400 |  |  |
| 400 - 500 |  |  |
| 500 - 1,000 |  |  |
| 1,000 - 2,000 |  |  |
| 2,000 - 3,000 |  |  |
| 3,000 - 4,000 |  |  |
| 4,000 - 5,000 |  |  |
|  5,000 - 15,000 |  |  |
| 15,000 - 25,000 |  |  |
| 25,000 - 50,000 |  |  |
| 50,000 - 75,000 |  |  |
| 75,000 - 100,000 |  |  |
| Over 100,000 |  |  |
| ALL |  |  |

# SCHEDULE S-4

Company \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Experience Period \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## ENDORSEMENT REPORT

|  |  |  |
| --- | --- | --- |
| Endorsement Type[10] | Number Issued | Revenue[11] |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| **TOTAL** |  |  |

# SCHEDULE S-5

Company \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Experience Period \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## SPECIAL CHARGES AND CREDITS REPORT

|  |  |  |
| --- | --- | --- |
| Special Charge Type[8] | Number of Charges | Revenue Received[9] |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| **TOTAL** |  |  |

|  |  |  |
| --- | --- | --- |
| Special Credit Type[8] | Number of Credits | Revenue Foregone[9] |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
|  |  |  |
| **TOTAL** |  |  |

# SCHEDULE S-6

Company \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Experience Period \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

## CO-INSURANCE REPORT

Note: Information should be reported separately for each co-insured risk and for each transaction type.

|  |  |  |  |
| --- | --- | --- | --- |
| TransactionType[4] | Name of EachCo-Insuring Company~~[16a]~~[17a] | Policy Number of Each Co-Insuring Company~~[16b]~~[17b] | Liability Assumed by Each Co-Insuring Company~~[16c]~~[17c] |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |
|  |  |  |  |

#

# TABLE 1

## Minimum Acceptable Content of Basic Statistical Record

1. Transaction Identifier ~~(See Note 1)~~

 For the case of insurance policies, use your internal policy number. For other transactions, use the title order number or any other equivalent notation sufficient to identify this transaction to your files.

2. Date of income recognition

3. Effective Date of Liability

4. Transaction Type ~~(See Note 2)~~

 The transaction type designation must contain sufficient information to differentiate among different rates charged. Standard transaction codes for Texas operations are set forth in Table 2 and Standard Personal Property Title Insurance Transaction codes for Texas Operations are set forth in Table 6. Companies electing to use different codes for their internal purposes must convert them to this format for purposes of Statistical Plan reporting.

5. Total Liability

6. Amount of Liability on which rate other than basic rate charged (e.g., prior indebtedness on mortgage extensions)

7. Gross Rate Charged **(excluding special charges or credits** ~~(See Note 3)~~ **and endorsements** ~~(See Note 4))~~

8. Special Charge or Credit Type (repeat as needed)

* The Basic Statistical Record must record each special charge or credit separately. The special charge or credit type designation must contain sufficient information to identify all distinct charge and credit types. Standard codes for Texas operations are set forth in Table 3.
* The Basic Statistical Record must record each policy, endorsement, or discount separately, relative to Personal Property Title Insurance Transactions. Standard Codes for Texas operations are set forth in Table 6.

9. Special Charge or Credit Amount (repeat as needed)

10. Endorsement Type (repeat as needed)

* The Basic Statistical Record must record each endorsement separately, whether the modification of coverage is by an endorsement form attached to the policy or by a change on or deletion in the policy itself. Standard codes for Texas operations are set forth in Table 4.
* The Basic Statistical Record must record each policy, endorsement, or discount separately, relative to Personal Property Title Insurance Transactions. Standard Codes for Texas operations are set forth in Table 6.

11. Endorsement Charge (repeat as needed)

12. Standard Insured Closing Service Type

 The Basic Statistical Record must record each Insured Closing Service letter separately with sufficient information to identify the type of Insured Closing Service letter issued (i.e. Lender or Purchaser/Seller.) Standard codes for Texas operations are set forth in Table 5 and Table 6.

~~12.~~13. State of Property

~~13~~14. County of Property ~~(See Note 6)~~

 Standard county codes for Texas operations are set forth in Table 7.

~~14.~~15. Mode of Issue ~~(See Note 7)~~

 Transactions must be classified into one of the following five categories as to the source of business:

 a. Through a direct operation of the underwriter;

 b. Through an owned or controlled agent or underwritten company;

 c. Through an independent non-attorney agent or underwritten company;

 d. Through an independent attorney agent;

 e. Through an approved attorney.

~~15.~~16. Agent’s or underwritten company’s commission/retention amount

~~16.~~17. On Co-insurance Policies:

 (a) Name of each co-insuring company

 (b) Policy number of each co-insuring company

 (c) Liability assumed by each co-insuring company.

# ~~NOTES TO TABLE 1~~

~~Note 1: For the case of insurance policies, use your internal policy number; for other transactions, use the title order number or any other equivalent notation sufficient to identify this transaction to your files.~~

~~Note 2: The transaction type designation must contain sufficient information to differentiate among different rates charged. Standard transaction codes for Texas operations are set forth in Table 2. Companies electing to use different codes for their internal purposes must convert them to this format for purposes of Statistical Plan reporting.~~

~~Note 3: The Basic Statistical Record must record each special charge or credit separately. The special charge or credit type designation must contain sufficient information to identify all distinct charge and credit types. Standard codes for Texas operations are set forth in Table 3.~~

~~Note 4: The Basic Statistical Record must record each endorsement separately, whether the modification of coverage is by an endorsement form attached to the policy or by a change on, or deletion in, the policy itself. Standard codes for Texas operations are set forth in Table 4.~~

~~Note 5: The Basic Statistical Record must record each Insured Closing Service letter separately with sufficient information to identify the type of Insured Closing Service letter issued. (i.e. Lender or Purchaser/Seller) Standard codes for Texas operations are set forth in Table 5.~~

~~Note 6: The Basic Statistical Record must record each policy, endorsement, or discount separately, relative to Personal Property Title Insurance Transactions. Standard Codes for Texas operations are set forth in Table 6.~~

~~Note 7: Standard county codes for Texas operations are set forth in Table 7.~~

~~Note 8: Transactions must be classified into one of the following five categories as to the source of business:~~

 ~~a. Through a direct operation of the underwriter;~~

 ~~b. Through an owned or controlled agent or underwritten company;~~

 ~~c. Through an independent non-attorney agent or underwritten company;~~

 ~~d. Through an independent attorney agent;~~

 ~~e. Through an approved attorney.~~

# TABLE 2

## Standard Transaction Codes for Texas Operations

|  |  |  |
| --- | --- | --- |
| Description of Transaction | Rate Rule Reference | Code |
| *Owner’s Policies* |  |  |
| Single Issue  | ~~R-3~~ R-1 | 1000 |
| ~~Single Issue (per S.B.I. Bulletin #120 )~~  Single Owner’s Policy for Separate Purchases  | R-3b | 1001 |
| Single Issue Pay-As-You-Go | R-2c | 1005 |
| Single Issue with Subsequent Improvements or Multiple Owner’s Policies surrendered with Single Issue with Subsequent Improvements | R-3a | 1100 |
| Single Issue at Contract Rate **(should be proposed for deletion due to being obsolete)** | R-10 | 1110 |
| Single Issue Following Construction | R-20 | 1190 |
| Single Issue U.S.A. (Forms T-6 or T-9) | R-17 | 7000 |
| Single Issue U.S.A. (Form T-11) | ~~R-3d~~ R-17 | 7050 |
| Single Owner’s Policy for Separate Purchases Simultaneous with Loan Policy ~~(per S.B.I. Bulletin #120)~~ | R-3b | 1002 |
| Simultaneous with Loan Policy | R-5a | 1200 |
| Simultaneous with Loan that Exceeds Owner’s | ~~R-5a~~ R-5b | 1201 |
| Simultaneous with Loan Pay-As-You-Go | ~~R-5b~~ R-5e | 1205 |
| Simultaneous with Loan that Exceeds Owner’s Pay-As-You-Go | ~~R-5b~~ R-5e | 1215 |
| Simultaneous with Loan with Credit for Previous Owner’s Policy or Policies (Owner’s Policy issued per P-8a) | ~~R-5a or~~ ~~R-5b or~~ R-5cR-5e | 1230 |
| Owner’s Policy Simultaneous with Loan with Credit for Previous Owner’s Policy or Policies (Owner’s Policy issued without P-8a) | R-5d | 1231 |
| Simultaneous with ~~Warrantor’s~~ Grantor’s | R-21 | 1250 |
| Simultaneous with Loan Following Construction in excess of $5,000,000 | R-20 | 1290 |
| ~~Credit on Owner's~~ Subsequent to Interim Construction Loan Binder | R-13B(2) | 0040 |
| Leasehold (Single Issue)  | ~~R-3a~~ R-1 | 1300 |
| Leasehold Simultaneous with Owner’s Policy | R-22 | 1350 |
| Leasehold Pay As-You-Go (Single Issue) | R-2c | 1305 |
| Leasehold (Simultaneous Issue) | R-5a | 1400 |
| Leasehold Pay-As-You-Go (Simultaneous Issue) | ~~R-5b~~ R-5e | 1405 |
| Leasehold (Simultaneous Issue) Loan Exceeds Owner’s | ~~R-5a~~ R-5b | 1500 |
| Leasehold Pay-As-You-Go (Simultaneous Issue) Loan Exceeds Owner’s~~)~~ | ~~R-5b~~ R-5e | 1505 |

**TABLE 2 (Continued)**

## Standard Transaction Codes for Texas Operations

|  |  |  |
| --- | --- | --- |
| Description of Transaction | Rate Rule Reference | Code |
| *Loan Policies* |  |  |
| Single Issue | R-1 | 3000 |
| Single Issue (Previously issued variable rate mortgagee/loan policy) | R-4 | ~~3000~~3001 |
| Single Issue Pay-As-You-Go | R-2a | 3005 |
| Single Issue Construction Loan ~~(First Policy)~~ | ~~R-18~~ R-1 | 3010 |
| Single Issue ~~Construction Loan (Final Policy)~~ (Refinance of Construction Loan | R-18 | 3011 |
| Single Issue First Lien Policy | R-7 | 3200 |
| Simultaneous with Owner’s Policy | R-5a | 3210 |
| Simultaneous with Owner’s Policy Pay-As-You-Go | ~~R-5b~~ R-5e | 3215 |
| Simultaneous with First Lien Policy | R-7 | 3220 |
| Simultaneous with Owner’s Policy when Loan Policy Exceeds Owner’s | ~~R-5a~~ R-5b | 3250 |
| Simultaneous with Owner’s Policy whenLoan Policy Exceeds Owner’s Pay-As-You-Go | ~~R-5b~~ R-5e | 3255 |
| Simultaneous with Owner’s with Credit for Previous Owner’s Policy or Policies | ~~R-5a~~ R-5cR-5e | 3280 |
| Simultaneous with Owner’s Following Construction in excess of $5,000,000 | R-20 | 3290 |
| Limited Pre-Foreclosure Policy (T-98)  | R-26 | 3295 |
| Limited Coverage Junior Loan Policy (T-44) | R-27a | 3297 |
| Leasehold (Single Issue)  | ~~R-4~~ R-1  | 3300 |
| Leasehold Pay-As-You-Go (Single Issue) | R-2a | 3305 |
| Leasehold (Simultaneous Issue) | R-5a | 3320 |
| Leasehold Pay-As-You-Go (Simultaneous Issue) | ~~R-5b~~ R-5e | 3325 |
| Leasehold (Simultaneous Issue) Loan Exceeds Owner’s | ~~R-5a~~ R-5b | 3340 |
| Leasehold Pay-As-You-Go (Simultaneous Issue) Loan Exceeds Owner’s | ~~R-5b~~ R-5e | 3345 |
| Subsequent to Owner’s Policy Excepting to Lien | R-6a | 3230 |
| Subsequent to Loan Policy | R-6b | 3240 |
| Insolvent Insurer Replacement Policy | R-6c | 3241 |
| ~~Credit on Loan~~ Subsequent to Interim Construction Loan Binder | R-13B(1) | 0030 |

**TABLE 2 (Continued)**

## Standard Transaction Codes for Texas Operations

|  |  |  |
| --- | --- | --- |
| Description of Transaction | Rate Rule Reference | Code |
| ~~Substitution~~ Refinance of Loan within One Year | R-8a | 4001 |
| ~~Substitution~~ Refinance of Loan within Two Years | R-8a | 4002 |
| ~~Substitution~~ Refinance of Loan within Three Years | R-8b | 4003 |
| ~~Substitution~~ Refinance of Loan within Four Years | R-8c | 4004 |
| ~~Substitution~~ Refinance of Loan within Five Years | R-8d | 4005 |
| ~~Substitution~~ Refinance of Loan within Six Years | R-8e | 4006 |
| ~~Substitution~~ Refinance of Loan within Seven Years | R-8f | 4007 |
| ~~Limited Coverage Policies~~  |  |  |
| Texas Limited Coverage Residential Chain of Title Policy Combined Schedule (T-53) ~~platted subdivision~~ | R-35~~(1)~~ | 6000 |
| ~~Texas Limited Coverage Residential Chain of Title Policy Combined Schedule (T-53) not a recorded, platted subdivision~~ | ~~R-35(2)~~ | ~~6005~~ |
| ~~Texas Limited Coverage Residential Chain of Title Policy Combined Schedule (T-53) each additional 12-month period~~ | ~~R-35(3)~~ | ~~6010~~ |
| *~~Non-Policy Transactions~~* |  |  |
| Interim Construction Loan Binder Transactions |  |  |
|  ~~Credit on Loan~~ Note: Moved to Loan Policies section | ~~R-13B(1)~~ | ~~0030~~ |
|  ~~Credit on Owner’s~~ Note: Moved to Owner’s Policy section | ~~R-13B(2)~~ | ~~0040~~ |
|  Original Year | R-13 | 8020 |
|  Each Subsequent Extension | R-13 | 8021 |

# TABLE 3

## Standard Special Charge and Credit Codes for Texas Operations

|  |  |  |
| --- | --- | --- |
| Description of Transaction | Rate Rule Reference | Code |
| Charge for Additional Chains of Title | R-9 | 0010 |
| Foreclosure Credit | R-14 | 0020 |
| Credit for Commitment Premium | R-23 | 0050 |
| Commitment to Texas Department of Transportation | R-23 | 8041 |
| Commitment, Issued to F.D.I.C., O.T.S. ~~and R.T.C.~~  | R-25 | 8042 |
| Credit for Exclusion of or General Exception for Minerals | R-36 | 9001 |
|  |  |  |

# TABLE 4

## Standard Endorsement Codes for Texas Operations

|  |  |  |
| --- | --- | --- |
| Description of Endorsement | Rate Rule Reference | Code |
| *Endorsements which do not affect amount of Liability stated in policy* |
| Down Date of Interim Construction Loan Binder (T-3) | R-11c | 0100 |
| Variable Rate Mortgage Endorsement (T-33) | R-11d | 0140 |
| Variable Rate Mortgage Endorsement for which there is no Charge  | ~~R-4~~ R-11d | 0141 |
| Variable Rate Mortgage – Negative Amortization Endorsement (T-33.1) | R-11d | 0142 |
| Variable Rate Mortgage – Negative Amortization Endorsement for which there is no Charge  | ~~R-4~~ R-11d | 0143 |
| Manufactured Housing (T-31) | R-11e | 0150 |
| Supplemental Coverage Manufactured Housing Unit Endorsement for Loan Policy (T-31.1) | R-11e | 0151 |
| Supplemental Coverage Manufactured Housing Unit Endorsement for Owner's Policy (T-31.1) | R-15 | 0152 |
| Assignment of Mortgage (T-3) | R-11a | 0211 |
| Partial Release, Modification, etc. (T-38) | R-11b | 0311 |
| Balloon Mortgage Endorsement, Issued at same as Policy (T-39) | R-11h | 0411 |
| Correction - Other than Policy Amount (T-3) | No Charge | 0400 |
| Balloon Mortgage Endorsement, Issued subsequent to Policy (T-39) | R-11h | 0412 |
| Amendment of Survey Exception for T-1 (T-3 or deletion) | R-16 | 0500 |
| Amendment of Survey Exception for T-1R (T-3 or deletion) | R-16 | 0501 |
| Completion of Improvements and Survey (T-3) | R-15 | 0550 |
| U.S.A. Policy Acquisition of Title (T-12)  | R-17 | 0600 |
| Amendment of Tax Exception (T-30, T-3 or deletion) | R-19 | 0700 |
| Not Yet Due and Payable Tax Amendment | R-24 | 0710 |
| Revolving Credit | R-11f | 0800 |
| EPA Endorsement (T-36) | R-11g | 0810 |
| Leasehold Owner's Policy Endorsement (T-4) | No Charge | 0820 |
| Residential Leasehold Endorsement (T-4R) | No Charge | 0821 |
| Leasehold Loan Policy Endorsement (T-5) | No Charge | 0822 |
| Limited Pre-Foreclosure Policy Down Date Endorsement (T-99) | R-26 | 0850 |
| Equity Loan Mortgage Endorsement (T-42) | R-28 | 0875 |
| Supplemental Coverage Equity Loan Mortgage Endorsement (T-42.1) | R-28 | 0876 |
| Texas Reverse Mortgage Endorsement (T-43) | No Charge | 0877 |
| Limited Coverage Junior Loan Home Equity Line of Credit/ Variable Rate (T-46) | R-27d | 0878 |
| Limited Coverage Junior Loan Down Date (T-45) | R-27c | 0879 |
| Limited Coverage Junior Loan Additional Coverage (T-3) | R-27b | 0880 |
| First Loss Endorsement (T-14) | R-11i | 0881 |

**TABLE 4 (Continued)**

## Standard Endorsement Codes for Texas Operations

|  |  |  |
| --- | --- | --- |
| ~~Last Dollar Endorsement (T-15)~~ **(withdrawn from use January 1, 2010)** | ~~R-11j~~ | ~~0882~~ |
| Loan Policy Aggregation Endorsement (T-16)  | ~~R-11k~~ R-11j | 0883 |
| Planned Unit Development Endorsement (T-17)  | ~~R-11l~~ R-11k | 0884 |
| Planned Unit Development Endorsement (T-17) issued on two or more policies issued simultaneously on the same land  | ~~R-11l~~ R-11k | 0887 |
| Condominium Endorsement (T-28)  | ~~R-11m~~ R-11l | 0888 |
| Restrictions, Encroachments, Minerals Endorsement on residential real property (T-19) | R-29A | 0885 |
| Restrictions, Encroachments, Minerals Endorsement on land which is not residential real property (T-19) | R-29B | 0886 |
| Restrictions, Encroachments, Minerals Endorsement - Owner's Policy (T-19.1) for a single issue policy on land which is residential property and no amendment of exception to area and boundaries is made | R-29C ~~(new)~~ | 0897 |
| Restrictions, Encroachments, Minerals Endorsement - Owner's Policy (T-19.1) for single issue policy on land which is residential and an amendment of exception to area and boundaries is made | R-29C ~~(new)~~ | 0898 |
| Restrictions, Encroachments, Minerals Endorsement - Owner's Policy (T-19.1) for a single issue policy on land which is not residential property and no amendment of exception to area and boundaries is made | R-29D ~~(was R-29C)~~ | 0889 |
| Restrictions, Encroachments, Minerals Endorsement - Owner's Policy (T-19.1) for a single issue policy on land which is not residential property and an amendment of exception to area and boundaries is made | R-29D ~~(was R-29C)~~ | 0895 |
| Minerals and Surface Damage Endorsement (T-19.2) for Owner's Policy on land which is for one-to-four family residential use of less than one acre or office, industrial, retail, mixed use retail/residential or multifamily purposes | R-29.1 | 0801 |
| Minerals and Surface Damage Endorsement (T-19.2) for Loan Policy on land which is for one-to-four family residential use of less than one acre or office, industrial, retail, mixed use retail/residential or multifamily purposes | R-29.1 | 0802 |

**TABLE 4 (Continued)**

## Standard Endorsement Codes for Texas Operations

|  |  |  |
| --- | --- | --- |
| Minerals and Surface Damage Endorsement (T-19.3) for Owner's Policy on land which is not for one-to-four family residential use of less than one acre or office, industrial, retail, mixed use retail/residential or multifamily purposes | R-29.1 | 0803 |
| Minerals and Surface Damage Endorsement (T-19.3) for Loan Policy on land which is not for one-to-four family residential use of less than one acre or office, industrial, retail, mixed use retail/residential or multifamily purposes | R-29.1 | 0804 |
| Access Endorsement (T-23)  | R-30 | 0890 |
| Non-Imputation Endorsement (T-24) | R-31 | 0891 |
| Non-Imputation Endorsement (Mezzanine Financing) (T-24.1) | R-31 | 0805 |
| Contiguity Endorsement (T-25) | R-32 | 0892 |
| Contiguity Endorsement (T-25.1) | No Charge | 0806 |
| Additional Insured Endorsement (T-26) | R-33 | 0893 |
| Assignment of Rents/Leases (T-27) | R-34 | 0894 |
| Co-Insurance Endorsement (T-48) | No Charge | 0896 |

|  |
| --- |
| *Endorsements which affect amount of Liability stated in policy* |
| Correction of Policy Amount (T-3) | No Charge | 0900 |
| Down Date of Construction Loan Policy (T-3) | R-11c | 0920 |
| Down Date of Owner's Policy During Construction (T-3) | R-15b | 0940 |
| Owner Policy Increased Value Endorsement (T-34)  | ~~R-3c~~ R-15a | 0960 |

#

# TABLE 5

##

## Standard Insured Closing Service Codes for Texas Operations

|  |  |  |
| --- | --- | --- |
| Description of Transaction | Rate Rule Reference | Code |
| Lender Insured Closing Service (T-50) | No Charge | 5000 |
| Purchaser/Seller Insured Closing Service (T-51) | No Charge | 5005 |

# TABLE 6

##

## Standard Personal Property Title Insurance Transaction Codes for Texas Operations

|  |  |  |
| --- | --- | --- |
| Description of Transaction | Rate Rule Reference | Code |
| Personal Property Title Insurance Owner’s Policy (PPT-1) | PPT R-1 | 2000 |
| Personal Property Title Insurance Lender’s Policy (PPT-2) | PPT R-1 | 2001 |
| Aggregation Endorsement (PPT-2.1) | PPT R-2 | 2002 |
| Gap Endorsement (PPT-2.2) | PPT R-3 | 2003 |
| Increase in Liability Endorsement (PPT-2.3) | PPT R-4 | 2004 |
| Datedown Endorsement (PPT-2.4) | PPT R-5 | 2005 |
| Change in Location of Debtor Endorsement (PPT-2.5) | PPT R-6 | 2006 |
| Mezzanine Endorsement (PPT-2.6) | PPT R-7 | 2007 |
| Assignment Endorsement (PPT-2.7) | PPT R-8 | 2008 |
| Co-Insurance Endorsement (PPT-1.8/2.8) | PPT R-9 | 2009 |
| Personal Property Title Insurance Search Policy (PPT-5) | PPT R-10 | 2010 |
| Personal Property Title Insurance Filing Policy (PPT-6) | PPT R-11 | 2011 |
| Personal Property Title Insurance Combined Search Policy (PPT-7) | PPT R-12 | 2012 |
| Personal Property Title Insurance Lender’s Policy (PPT-8) | PPT R-13 | 2013 |
| Personal Property Title Insurance Owner’s Policy (PPT-9) | PPT R-14 | 2014 |
| Seller’s Lien Endorsement (PPT-8.1) | PPT R-15 | 2015 |
| Tax Lien Endorsement (PPT-8.2) | PPT R-16 | 2016 |
| Mezzanine Endorsement (PPT-8.3) | PPT R-17 | 2017 |
| Pledged Equity Endorsement (PPT-8.4) | PPT R-18 | 2018 |
| Change of Name of Insured Endorsement (PPT-8.5) | PPT R-19 | 2019 |
| Lender’s Aggregation Endorsement (PPT-8.6) | PPT R-20 | 2020 |
| Renewal Endorsement (PPT-8.7) | PPT R-21 | 2021 |
| Waiver of Attorney Subrogation Rights Endorsement (PPT-8.8) | PPT R-22 | 2022 |
| Springing Control Endorsement (PPT 8.9) | PPT R-23 | 2023 |
| Post Policy Tax Lien Endorsement (PPT-8.10) | PPT R-24 | 2024 |
| Borrower’s Status Endorsement (PPT-8.11) | PPT R-25 | 2025 |
| Post Policy Judgment Lien Endorsement (PPT-8.12) | PPT R-26 | 2026 |
| Buyer’s Aggregation Endorsement (PPT-9.1) | PPT R-27 | 2027 |
| Pending Suites and Judgments Endorsement (PPT-9.2) | PPT R-28 | 2028 |
| Increase in Tax Lien Coverage Endorsement (PPT-9.3) | PPT R-29 | 2029 |
| Owner’s Equity Ownership Endorsement (PPT-9.4) | PPT R-30 | 2030 |
| Owner’s Policy Insuring Clauses Endorsement (PPT-9.5) | PPT R-31 | 2031 |
| Personal Property Title Insurance Owner’s Policy (PPT-10) | PPT R-32 | 2032 |
| Personal Property Title Insurance Lender’s Policy (PPT-12) | PPT R-32 | 2033 |
| Landlord’s Lien Endorsement (PPT-12.1) | PPT R-34 | 2034 |
| Lapse Endorsement (PPT-12.2) | PPT R-35 | 2035 |
| Mezzanine Financing Endorsement (PPT-12.5) | PPT R-36 | 2036 |
| Prior Owner's Endorsement (PPT-12.3) | PPT R-37 | 2037 |
| Tie-in Endorsement (PPT-12.6) | PPT R-38 | 2038 |
| Federal Tax Lien Endorsement (PPT-12.4) | PPT R-39 | 2039 |
| Mixed Collateral Transactions Discount | PPT R-33(a) | 2040 |

**TABLE 6 (Continued)**

## Standard Personal Property Title Insurance Transaction Codes for Texas Operations

|  |  |  |
| --- | --- | --- |
| Description of Transaction | Rate Rule Reference | Code |
| Simultaneous Issue Discount | PPT R-33(c) | 2041 |
| Simultaneous Issue Discount | PPT R-14 | 2042 |
| Simultaneous Rate Discount | PPT R-1 | 2043 |
| Mixed Collateral Discount | PPT R-13 | 2044 |
| Project or Portfolio Rate Discount | PPT R-13 | 2045 |
| Mixed Collateral Discount | PPT R-1 | 2046 |

# TABLE 7

## Standard County Codes for Texas

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Anderson | 001 |  | Calhoun | 057 |  | Dallas | 113 |
| Andrews | 003 |  | Callahan | 059 |  | Dawson | 115 |
| Angelina | 005 |  | Cameron | 061 |  | Deaf Smith | 117 |
| Aransas | 007 |  | Camp | 063 |  | Delta | 119 |
| Archer | 009 |  | Carson | 065 |  | Denton | 121 |
| Armstrong | 011 |  | Cass | 067 |  | DeWitt | 123 |
| Atascosa | 013 |  | Castro | 069 |  | Dickens | 125 |
| Austin | 015 |  | Chambers | 071 |  | Dimmit | 127 |
| Bailey | 017 |  | Cherokee | 073 |  | Donley | 129 |
| Bandera | 019 |  | Childress | 075 |  | Duval | 131 |
| Bastrop | 021 |  | Clay | 077 |  | Eastland | 133 |
| Baylor | 023 |  | Cochran | 079 |  | Ector | 135 |
| Bee | 025 |  | Coke | 081 |  | Edwards | 137 |
| Bell | 027 |  | Coleman | 083 |  | Ellis | 139 |
| Bexar | 029 |  | Collin | 085 |  | El Paso | 141 |
| Blanco | 031 |  | Collingsworth | 087 |  | Erath | 143 |
| Borden | 033 |  | Colorado | 089 |  | Falls | 145 |
| Bosque | 035 |  | Comal | 091 |  | Fannin | 147 |
| Bowie | 037 |  | Comanche | 093 |  | Fayette | 149 |
| Brazoria | 039 |  | Concho | 095 |  | Fisher | 151 |
| Brazos | 041 |  | Cooke | 097 |  | Floyd | 153 |
| Brewster | 043 |  | Coryell | 099 |  | Foard | 155 |
| Briscoe | 045 |  | Cottle | 101 |  | Fort Bend | 157 |
| Brooks | 047 |  | Crane | 103 |  | Franklin | 159 |
| Brown | 049 |  | Crockett | 105 |  | Freestone | 161 |
| Burleson | 051 |  | Crosby | 107 |  | Frio | 163 |
| Burnet | 053 |  | Culberson | 109 |  | Gaines | 165 |
| Caldwell | 055 |  | Dallam | 111 |  | Galveston | 167 |

# TABLE 7 (Continued)

## Standard County Codes for Texas

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Garza | 169 |  | Houston | 225 |  | Lampasas | 281 |
| Gillespie | 171 |  | Howard | 227 |  | La Salle | 283 |
| Glasscock | 173 |  | Hudspeth | 229 |  | Lavaca | 285 |
| Goliad | 175 |  | Hunt | 231 |  | Lee | 287 |
| Gonzales | 177 |  | Hutchinson | 233 |  | Leon | 289 |
| Gray | 179 |  | Irion | 235 |  | Liberty | 291 |
| Grayson | 181 |  | Jack | 237 |  | Limestone | 293 |
| Gregg | 183 |  | Jackson | 239 |  | Lipscomb | 295 |
| Grimes | 185 |  | Jasper | 241 |  | Live Oak | 297 |
| Guadalupe | 187 |  | Jeff Davis | 243 |  | Llano | 299 |
| Hale | 189 |  | Jefferson | 245 |  | Loving | 301 |
| Hall | 191 |  | Jim Hogg | 247 |  | Lubbock | 303 |
| Hamilton | 193 |  | Jim Wells | 249 |  | Lynn | 305 |
| Hansford | 195 |  | Johnson | 251 |  | McCulloch | 307 |
| Hardeman | 197 |  | Jones | 253 |  | McLennan | 309 |
| Hardin | 199 |  | Karnes | 255 |  | McMullen | 311 |
| Harris | 201 |  | Kaufman | 257 |  | Madison | 313 |
| Harrison | 203 |  | Kendall | 259 |  | Marion | 315 |
| Hartley | 205 |  | Kenedy | 261 |  | Martin | 317 |
| Haskell | 207 |  | Kent | 263 |  | Mason | 319 |
| Hays | 209 |  | Kerr | 265 |  | Matagorda | 321 |
| Hemphill | 211 |  | Kimble | 267 |  | Maverick | 323 |
| Henderson | 213 |  | King | 269 |  | Medina | 325 |
| Hidalgo | 215 |  | Kinney | 271 |  | Menard | 327 |
| Hill | 217 |  | Kleberg | 273 |  | Midland | 329 |
| Hockley | 219 |  | Knox | 275 |  | Milam | 331 |
| Hood | 221 |  | Lamar | 277 |  | Mills | 333 |
| Hopkins | 223 |  | Lamb | 279 |  | Mitchell | 335 |

# TABLE 7 (Continued)

## Standard County Codes for Texas

|  |  |  |  |  |  |  |  |
| --- | --- | --- | --- | --- | --- | --- | --- |
| Montague | 337 |  | Robertson | 395 |  | Travis | 453 |
| Montgomery | 339 |  | Rockwall | 397 |  | Trinity | 455 |
| Moore | 341 |  | Runnels | 399 |  | Tyler | 457 |
| Morris | 343 |  | Rusk | 401 |  | Upshur | 459 |
| Motley | 345 |  | Sabine | 403 |  | Upton | 461 |
| Nacogdoches | 347 |  | San Augustine | 405 |  | Uvalde | 463 |
| ~~Navaro~~ Navarro | 349 |  | San Jacinto | 407 |  | Val Verde | 465 |
| Newton | 351 |  | San Patricio | 409 |  | Van Zandt | 467 |
| Nolan | 353 |  | San Saba | 411 |  | Victoria | 469 |
| Nueces | 355 |  | Schleicher | 413 |  | Walker | 471 |
| Ochiltree | 357 |  | Scurry | 415 |  | Waller | 473 |
| Oldham | 359 |  | Shackelford | 417 |  | Ward | 475 |
| Orange | 361 |  | Shelby | 419 |  | Washington | 477 |
| Palo Pinto | 363 |  | Sherman | 421 |  | Webb | 479 |
| Panola | 365 |  | Smith | 423 |  | Wharton | 481 |
| Parker | 367 |  | Somervell | 425 |  | Wheeler | 483 |
| Parmer | 369 |  | Starr | 427 |  | Wichita | 485 |
| Pecos | 371 |  | Stephens | 429 |  | Wilbarger | 487 |
| Polk | 373 |  | Sterling | 431 |  | Willacy | 489 |
| Potter | 375 |  | Stonewall | 433 |  | Williamson | 491 |
| Presidio | 377 |  | Sutton | 435 |  | Wilson | 493 |
| Rains | 379 |  | Swisher | 437 |  | Winkler | 495 |
| Randall | 381 |  | Tarrant | 439 |  | Wise | 497 |
| Reagan | 383 |  | Taylor | 441 |  | Wood | 499 |
| Real | 385 |  | Terrell | 443 |  | Yoakum | 501 |
| Red River | 387 |  | Terry | 445 |  | Young | 503 |
| Reeves | 389 |  | Throckmorton | 447 |  | Zapata | 505 |
| Refugio | 391 |  | Titus | 449 |  | Zavala | 507 |
| Roberts  | 393 |  | Tom Green | 451 |  |  |  |