

Demutualizations and Mutual Holding Companies

The titles of our articles about demutualizations and mutual holding companies and the dates of the issues in which they appeared are listed below. The prices of the issues are also indicated. The articles we consider the most important are in bold. For ordering information, see the order form on the page following this list.

Issue	Title of Article	Price ✓
January 2010	An Appellate Court Ruling on the Taxation of Demutualization Distributions	\$10 _____
November 2008	An Important Court Decision about the Income Taxation of Demutualization Distributions	10 _____
March 2008.....	Nationwide's Confidential Method of Determining Dividends on Life Insurance Policies	10 _____
December 2005	A Disapproved Reorganization Plan Involving Security Mutual Life of New York and Ohio National Life	10 _____
August 2003	The Lawsuit against John Hancock's Officers and Directors; Executive Compensation and Financial Services Integration	20 _____
June 2003	Income Taxation of Distributions to Policyholders in Demutualizations ..	5 _____
November 2002.....	Further Secrecy in the Confidential Allocation Formula at Provident Mutual.....	5 _____
August 2002	A Big Payday for Six Departing Executives of Provident Mutual.....	10 _____
December 2001.....	What Provident Mutual Will Not Allow Its Policyholders To See Until Later.....	10 _____
October 2001	Jason Adkins, David Schiff, Allied Mutual, and an Important Iowa Supreme Court Decision	10 _____
May 2000	Characteristics of an Excellent Demutualization Plan	5 _____
January 2000.....	Wit Capital and the Demutualization of John Hancock; Provident Mutual Withdraws Its Mutual Holding Company Reorganization Plan.....	5 _____
December 1999.....	The Strange Results of the Allocation Formula in the Demutualization of John Hancock.....	5 _____
November 1999.....	Another Major Setback for Provident Mutual and the Mutual Holding Company Concept; American United Life Puts Redomestication on Hold; American United Life Changes Its Definition of a Mutual Insurer.....	5 _____
August 1999	More on the Canadian Approach to the Allocation of Value to Policyholders in Demutualizations.....	5 _____
May 1999	The Strange Results of the Allocation Formula in the Demutualization of Standard Insurance Company	5 _____

Demutualizations and Mutual Holding Companies

(continued)

Issue	Title of Article	Price ✓
April 1999	Provident Mutual's Legal Snag—A Stunning Setback for the Mutual Holding Company Concept ; Eligibility—An Important Issue in Demutualizations; GenAmerica's Announcement about the End of Its Mutual Holding Company Experiment; American Mutual's Announcement about the End of Its Mutual Holding Company Experiment; An Income Tax Victory for the Mutual Holding Company Concept	5 _____
February 1999.....	Mutual Holding Companies and the Distribution of Surplus to Participating Policyowners.....	10 _____
January 1999.....	The Pennsylvania Insurance Department's Approval of Provident Mutual's Anti-Policyowner Reorganization Plan.....	5 _____
July 1998	The Iowa Commissioner's Anti-Policyowner Decision on Principal Mutual's Reorganization Plan	5 _____
June 1998.....	The Apparent Cover-Up at Provident Mutual; The Grannis Committee Report	10 _____
May 1998	Democracy at Provident Mutual—A Case Study in the Suppression of Communication among Policyowners ; Covenant Life and Provident Mutual; Why We Need Mutual Life Insurers (by James H. Hunt); An Income Tax Setback for the Mutual Holding Company Concept....	10 _____
April 1998.....	Observations on the Governance of Mutual Insurance Companies ; Democracy at Allied Mutual— A Case Study in the Lack of Disclosure to Voters; Principal Mutual and the New York Insurance Department; Provident Mutual and the Pennsylvania Insurance Department.....	10 _____
December 1997.....	The Mutual Holding Company— A Flawed Concept.....	5 _____
October 1997	Allowing Mutual Insurance Companies To Select Their State Regulators— A Dangerous Federal Proposal.....	5 _____
May 1997.....	More on the Extraordinary Turnabout in the Demutualization of State Mutual Life	10 _____
March 1997.....	General American and the Mutual Holding Company Concept	5 _____
February 1997.....	An Extraordinary Turnabout in the Demutualization of State Mutual Life.....	5 _____
December 1996.....	Some Additional Information about the Merger of New England Mutual into Metropolitan Life.....	5 _____
November 1995	Farewell to New England Mutual; The Demutualization of State Mutual ..	5 _____
December 1994.....	The Demutualization of Midland Mutual Life; State Life's Alliance with American United Life	5 _____

Total \$ _____

We absorb mailing costs, but prepayment is required. We accept checks, MasterCard, and Visa. To place an order, indicate the total cost of the issues you wish to order, complete this order form, and mail it with your check and the list of issues to *The Insurance Forum*, P.O. Box 245, Ellettsville, IN 47429. Please make checks payable to *The Insurance Forum*. Indiana addressees please add 7% sales tax. If you wish to pay by credit card, you may fax your order to us at (812) 876-6572, or call us toll-free at (888) 876-9590.

Total price of issues: _____

Indiana addressees please add 7% sales tax: _____

Total amount enclosed: _____

My check is enclosed

Charge to my: Visa MasterCard

Credit Card #: _____ - _____ - _____ - _____

CVV code: _____ (three digit number in signature panel on back of credit card)

Expiration date: _____ Phone number: (_____) _____ - _____ x _____

Signature: _____

Print Cardholder Name: _____

Shipping address:

Billing address (if different):
