

Annual Report Filing Instructions for Perpetual Care Cemeteries

The Division requires the use of [OPTins](#) (Online Premium Tax for Insurance) for the submission of the perpetual care cemetery annual report. OPTins is a secure Web application which facilitates the submission of premium tax, surplus lines, and other state-specific filings and payments to participating states.

Registration

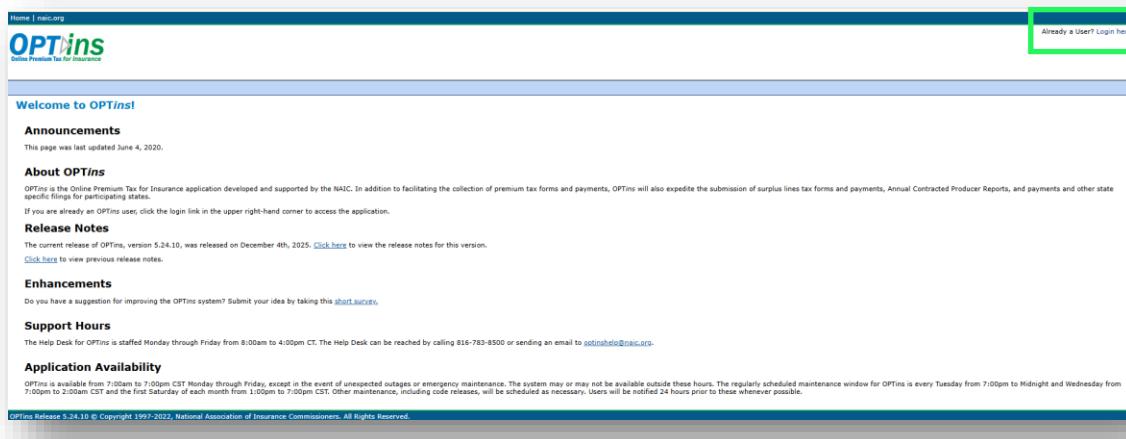
If you do not have an OPTins account, please visit the [OPTins content page](#) and scroll down to access the implementation paperwork. Select the **Standard Implementation Paperwork** and download the PDF. When you have completed the paperwork, add it as an attachment on a new email to the OPTins Marketing Team at optinsmktg@naic.org.

If you have questions about the form, please email the OPTins Marketing Team or call 816-783-8787 and leave a message. Setup of a new account may take 7-10 business days. If you already use OPTins, you do not need to contact OPTins Marketing; just enter your username and password at [OPTins User Login](#).

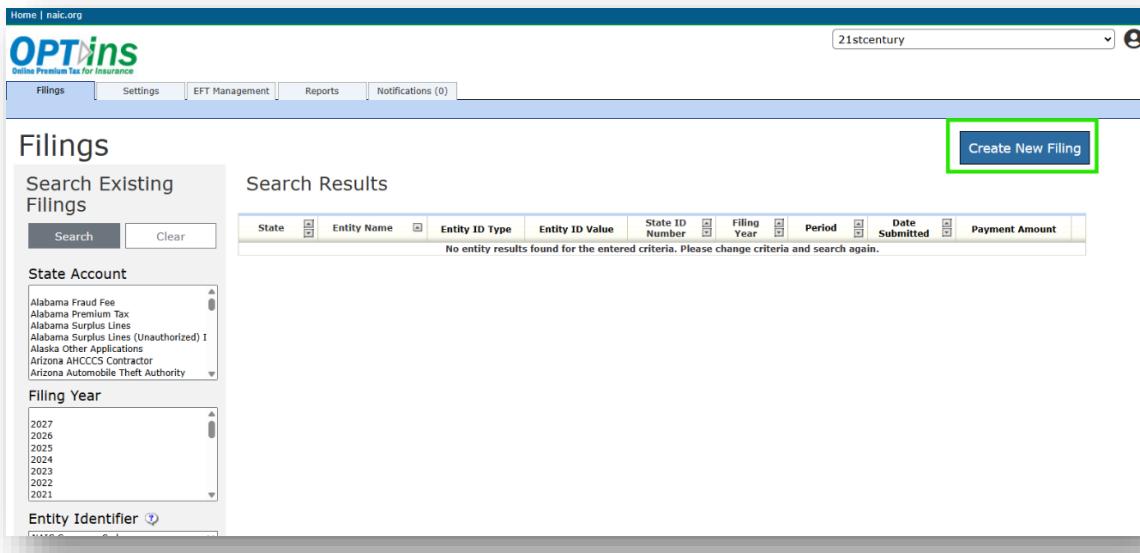
Filing

The following are step-by-step instructions for filing a perpetual care cemetery annual report in [OPTins](#).

Step 1 - Login: After registering with OPTins, go to [OPTins](#) and click on **Login here** to log into your account.

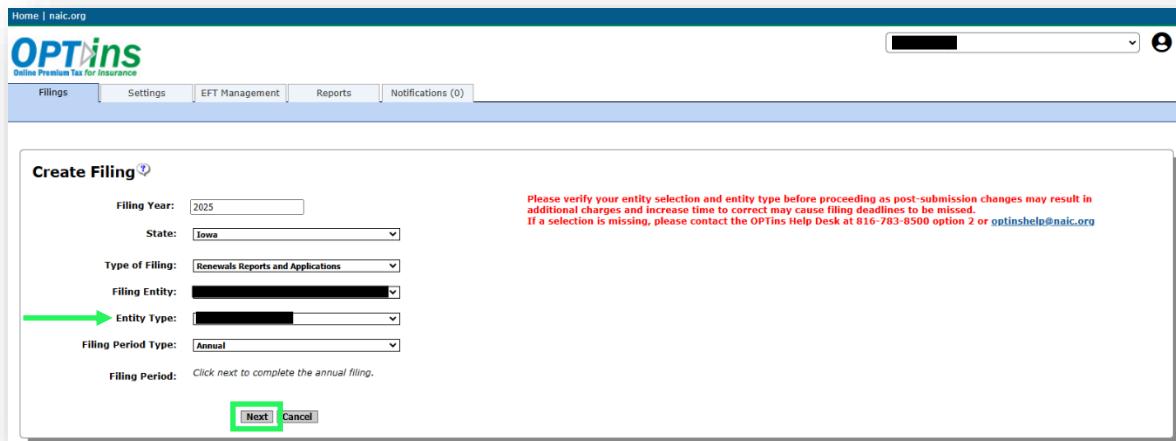


Step 2 - Create Filing: To create a new annual report filing, click the **Create New Filing** button.



The screenshot shows the OPTins Filings interface. At the top right, there is a button labeled "Create New Filing" which is highlighted with a green box. The main area is titled "Filings" and contains a "Search Existing Filings" section with "Search" and "Clear" buttons. Below this is a "State Account" dropdown menu listing various state accounts. A "Filing Year" dropdown menu shows years from 2027 down to 2021. A "Search Results" table is present, showing a single row with the message "No entity results found for the entered criteria. Please change criteria and search again." The table has columns for State, Entity Name, Entity ID Type, Entity ID Value, State ID Number, Filing Year, Period, Date Submitted, and Payment Amount.

Step 3 – Select Filing Type: This will take you to the filing wizard where you will select **Perpetual Care Cemetery** from the drop-down menu under **Entity Type**. Then click the **Next** button:



The screenshot shows the "Create Filing" wizard. The "Entity Type" dropdown menu is highlighted with a green box. The "Next" button at the bottom of the form is also highlighted with a green box. The form includes fields for Filing Year (2025), State (Iowa), Type of Filing (Renewals Reports and Applications), Filing Entity, Entity Type (highlighted with a green box), and Filing Period Type (Annual). A note on the right side of the form reads: "Please verify your entity selection and entity type before proceeding as post-submission changes may result in additional charges and increase time to correct may cause filing deadlines to be missed. If a selection is missing, please contact the OPTins Help Desk at 816-783-8500 option 2 or optinshelp@naic.org".

Step 4 – Download Annual Report Form: This will take you to the screen to access a blank copy of the Perpetual Care Cemetery Annual Report form. Download this form and fill in the requested information.

Iowa Renewals Reports and Applications - Annual Submission

State Instructions for Submission [?](#)
Additional Instructions for [REDACTED]

Submission Steps for [REDACTED] [?](#)

NAIC Company Code: [REDACTED] National Producer Number: [REDACTED]
Group Code: [REDACTED] State ID Number: [REDACTED]
FEIN: [REDACTED] State Of Domicile: [REDACTED]

Upload Form(s)
Use this section to attach state forms for state review of your submission. [?](#)

State Provided Forms:

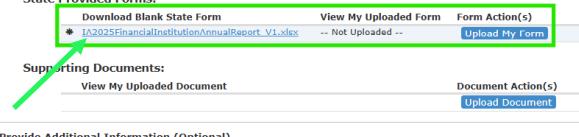
Download Blank State Form	View My Uploaded Form	Form Action(s)
* IAS025FinancialInstitutionAnnualReport_V1.xlsx	-- Not Uploaded --	Upload My Form

Supporting Documents:

View My Uploaded Document	Document Action(s)
	Upload Document

Provide Additional Information (Optional)

[Previous](#) [Save as Draft](#) [Next](#) [Cancel](#)



Step 5 – Upload the Annual Report Form: After filling out the Perpetual Care Cemetery Annual Report form, save a copy to your computer, click the **Upload My Form** button to upload the form to OPTins.

Iowa Renewals Reports and Applications - Annual Submission

State Instructions for Submission [?](#)
Additional Instructions for [REDACTED]

Submission Steps for [REDACTED] [?](#)

NAIC Company Code: [REDACTED] National Producer Number: [REDACTED]
Group Code: [REDACTED] State ID Number: [REDACTED]
FEIN: [REDACTED] State Of Domicile: [REDACTED]

Upload Form(s)
Use this section to attach state forms for state review of your submission. [?](#)

State Provided Forms:

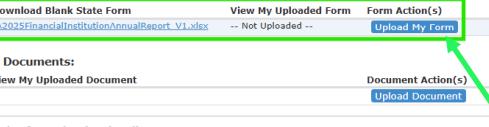
Download Blank State Form	View My Uploaded Form	Form Action(s)
* IAS025FinancialInstitutionAnnualReport_V1.xlsx	-- Not Uploaded --	Upload My Form

Supporting Documents:

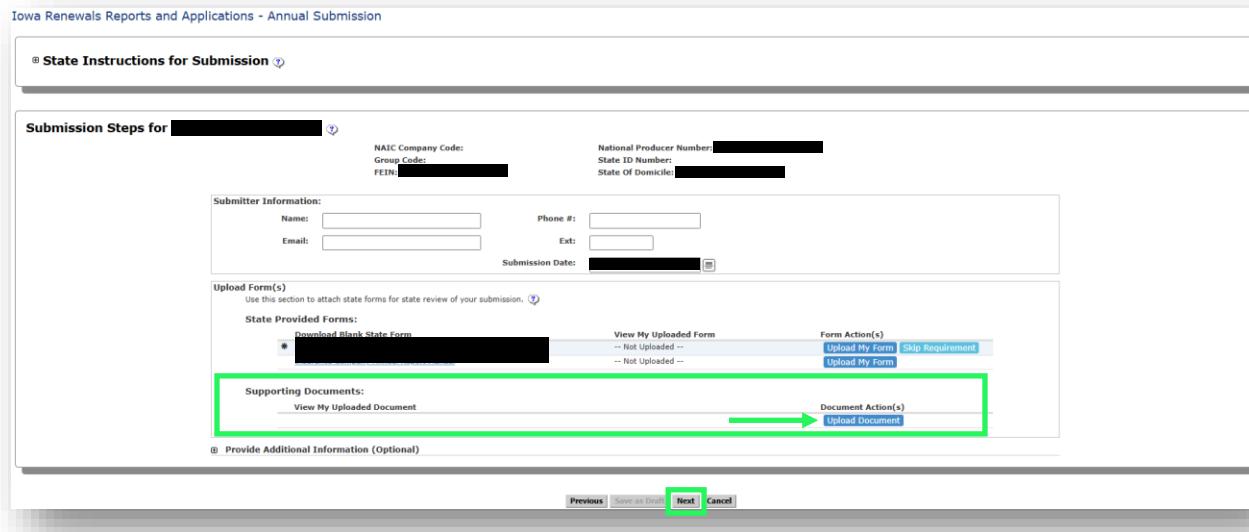
View My Uploaded Document	Document Action(s)
	Upload Document

Provide Additional Information (Optional)

[Previous](#) [Save as Draft](#) [Next](#) [Cancel](#)



Step 6 – Upload Supporting Documents: Click the **Upload Document** button and upload all financial documents that demonstrate the end-of-calendar-year balances for all perpetual care funds. Then click the **Next** button:



Iowa Renewals Reports and Applications - Annual Submission

State Instructions for Submission

Submission Steps for [REDACTED]

Submitter Information:

NAIC Company Code: [REDACTED]
Group Code: [REDACTED]
FEIN: [REDACTED]

National Producer Number: [REDACTED]
State ID Number: [REDACTED]
State Of Domicile: [REDACTED]

Submission Date: [REDACTED]

Upload Form(s): Use this section to attach state forms for state review of your submission. [?](#)

State Provided Forms:

Download Blank State Form [?](#)

View My Uploaded Form [?](#)

Form Action(s):

-- Not Uploaded -- [Upload My Form](#) [Skip Requirement](#)

-- Not Uploaded -- [Upload My Form](#)

Supporting Documents:

View My Uploaded Document [?](#)

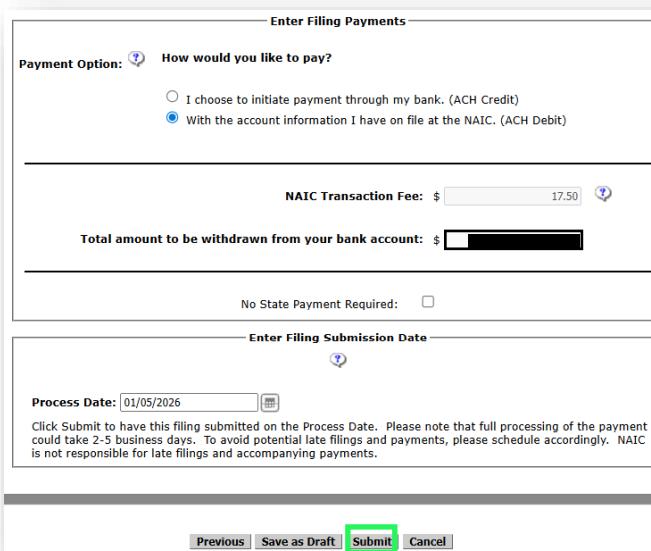
Document Action(s):

[Upload Document](#) [?](#)

Provide Additional Information (Optional)

Previous Save as Draft **Next** Cancel

Step 6 – Payment: This will take you to the payment page. At the time of filing the annual report, a perpetual care cemetery is required to pay \$10.00 in fees for each certificate of interment rights issued during the previous calendar year. OPTins charges a flat fee of \$17.50 per filing. Enter the payment information and click the **Submit** button to submit the annual report to the Iowa Insurance Division.



Enter Filing Payments

Payment Option: [?](#) How would you like to pay?

I choose to initiate payment through my bank. (ACH Credit)

With the account information I have on file at the NAIC. (ACH Debit)

NAIC Transaction Fee: \$ 17.50 [?](#)

Total amount to be withdrawn from your bank account: \$ [REDACTED]

No State Payment Required:

Enter Filing Submission Date

Process Date: 01/05/2026 [?](#)

Click Submit to have this filing submitted on the Process Date. Please note that full processing of the payment could take 2-5 business days. To avoid potential late filings and payments, please schedule accordingly. NAIC is not responsible for late filings and accompanying payments.

Previous Save as Draft **Submit** Cancel

Questions

For all technical questions regarding the OPTins system, please contact OPTins Product Assistance Help Desk at optinhelp@naic.org or call 816-783-8500.

For questions related to the contents of the annual report, please email riu@iid.iowa.gov or call 515-654-6472.