

Transfer of Agency of Record Agreement

The Authorized Signer – Existing Agency (“Current AOR”), intends to release all ownership and control rights of the described and/or attached groups and/or contracts to the Authorized Signer – Receiving Agency (“Receiving Agency”) for placement under the entity which they are signing on behalf of. This release will transfer as of __/__/__, such that following that date all rights of representation of HealthPartners and its Related Entities (Group Health, Inc., HealthPartners Insurance Company, HealthPartners UnityPoint Health, and HealthPartners Administrators, Inc.) products and services are transferred and assigned to Receiving Agency.

After execution this Transfer of Agency of Record for what the Existing Agency considers valuable consideration, the Existing Agency has no right to direct HealthPartners and its Related Entities to once again become the controlling party or Agent of Record of the described and/or attached groups and/or contracts unless specifically called out by the Existing Agency and Receiving Agency as part of their transfer agreement or as part of the FMO Brokerage Firm Agreement between the Receiving Agency and HealthPartners and/or its Related Entities. The Existing Agency should consult with the Receiving Agency on your future rights. HealthPartners will take any future transfer of representation of the groups or contracts transferred solely from the Receiving Agency unless provided for in certain FMO Brokerage Firm Agreements.

The description of book of business being transferred from the Existing Agency to the Receiving Agency is as follows:

(in lieu of a description a list of groups and or contracts should be attached)

Name
Authorized Signer - Existing Agency

Name
Authorized Signer – Receiving Agency

Print

Print

Signature

Signature

Date

Date

