

Notice of Intent – Transfer Release Form

Important: Complete only ONE portion of this form based on which option you’re choosing, “notice of intent to transfer” or “transfer release.” Please note transfers are not permitted from October 1 – December 31.

Notice of Intent to Transfer Option

There is a 90-day waiting period from the date you submit your onboarding case to when the change is processed. You may continue to write business during the waiting period.

1. **Requesting for** (check one): Agent only Agent and downline

2. **Name of your new upline:**

3. **Individual agent or agency requesting this move:**

Agent name

Agency name

Signature and date

National Producer Number or TIN

Transfer Release Option

There is no waiting period to process a change using the transfer release option.

1. **Requesting for** (check one): Agent only Agent and downline

2. **Name of the individual agent or agency requesting release:**

Agent name

Agency name

Signature and date

National Producer Number or TIN

3. **Approval from your current immediate upline:**

Agent name

Agency name, if applicable

Signature and date

National Producer Number or TIN

4. **Approval from your current top of hierarchy** (if different from the immediate upline):

Name (principal of the agency)

Agency name

Signature and date

National Producer Number or TIN