

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