

Carrier	Transfer Terms & Requirements		Transfer Process / Paperwork	Notes / Links	PPI Contact
	If the agent...	Then the agent must...			
ABACUS	Is appointed	Complete assignment of commission form on the contract to the new FMO. All new business will be credited to the new FMO. Old business will renew to the original FMO, unless a revocation letter is signed or company letterhead by an officer of the FMO.	Complete paper contract		terryb@ppisales.info
Aetna/Coventry MA	Transferred or wrote business within the past 6 months	Obtain an Aetna specific release form that must be signed by the authorized signateur for the Agency being transferred from	Request contracting link from terryb@ppisales.info	TRANSFERS WILL NOT BE ACCEPTED UNTIL 1/1/17	terryb@ppisales.info
Americo	Contracted in last 6 months	Obtain release from IMO Only	Complete contract in SuranceBay. If release is required, send by email to jennyb@ppisales.info , or by fax with cover sheet to (800) 539-1021.	SuranceBay Link	jennyb@ppisales.info
	Wrote business in last 6 months	Obtain release signed by both IMO and Direct Upline			
	Is inactive for more than 6 months	No release required for transfer			
Anthem	Is appointed	A written release from current GA is required, or they can wait a 6 month period to transfer.	Complete Paper Contract	Existing agents do not need to pay additional appointment fees	annap@ppisales.info
BCBS of SC	Is appointed	No release required for transfer	Complete "Transfer" document in SuranceBay - NOTE: Transfers will not be processed UNTIL AFTER 1/1/17	SuranceBay link	terryb@ppisales.info
Cigna Healthspring MA	Wrote business in last 6 months	Obtain written release from FMO. If FMO is unwilling to grant release, agent can submit request to CHS and wait 6 months. Production is permitted during this 6-month wait, but override stays with existing FMO. Agent must submit new contracting after the 6-month wait.	Complete contract in SuranceBay. If release is required, send by email to jennyb@ppisales.info , or by fax with cover sheet to (800) 539-1021.	SuranceBay link	jennyb@ppisales.info
	Is inactive for more than 6 months	No release required for transfer			
Cigna Med Supp	Is appointed	Each transfer is evaluated on a case-by-case basis	Email jennyb@ppisales.info for link		jennyb@ppisales.info
CUL (Central Untied Life / Family Life Insurance Co)	Wrote business in last 6 months	Obtain written or emailed release	Request contracting link from sarahm@ppisales.info		sarahm@ppisales.info
	Is inactive for more than 6 months	No release required for transfer			
CSI Life	Is appointed	Complete a paper contract for transfer.	Request Transfer documents from haley@ppisales.info .	New hierarchy must be established prior to agent's tranfer. Haley will direct how to establish/correct hierarchy if necessary.	haley@ppisales.info
Gerber Life	Is appointed	Fill out transfer contract on Surancebay.	Complete new contract in SuranceBay. Agent must submit first piece of business following transfer to Haley Peek by fax, with cover, to (800) 539-1021.	SuranceBay link	haley@ppisales.info
GTL	Wrote business in last 6 months	Obtain written release from current FMO	Complete new contract in SuranceBay. If required, send release to Jenny Gates by email (jennyb@ppisales.info) or fax to (800) 539-1021.	SuranceBay link	jennyb@ppisales.info
	Is inactive for more than 6 months	No release required for transfer			
Heartland National	Wrote business in last 6 months	Obtain written release from current FMO	Complete new contract in SuranceBay. If required, send release to Jenny Gates by email (jennyb@ppisales.info) or fax to (800) 539-1021.	SuranceBay link	jennyb@ppisales.info
	Is inactive for more than 6 months	No release required for transfer			

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Humana MA	Is appointed	Obtain written release from current MGA/upline. If MGA will not release, agent can request from Humana and wait 180 days. Agent is permitted to produce during the 180-day wait, but overrides follow to current MGA.	Complete this form - and send to annap@ppisales.info		annap@ppisales.info
Manhattan Life	Is appointed	Complete a paper contract for transfer.	Request Transfer document from haleypp@ppisales.info .	New hierarchy must be established prior to agent's transfer. Haley will direct how to establish/correct hierarchy if necessary.	haleypp@ppisales.info
Medico	Has been appointed for less than 6 months	Obtain written release from current FMO. If FMO will not grant a release, agent can request transfer from Medico and wait 6 months. Production is permitted during this 6-month wait, but override stays with existing FMO. Agent must submit new contracting after the 6-month wait.	Complete new contract in SuranceBay. If required, send release to Jenny Gates by email (jennyb@ppisales.info) or fax to (800) 539-1021.	SuranceBay link	jennyb@ppisales.info
	Wrote business in last 6 months				
	Has been appointed and inactive for more than 6 months	No release required for transfer			
Medova	Is appointed	Fill out transfer contract on Surancebay	Send release to Haley Peek by email (haleypp@ppisales.info) or fax to 800-539-1021		haleypp@ppisales.info
Mutual of Omaha	Is transferring Life products	No release required for transfer	Complete new contract in SuranceBay. If required, send the Mutual of Omaha release form to Jenny Gates by email (jennyb@ppisales.info) or fax to (800) 539-1021.	SuranceBay link	jennyb@ppisales.info
	Is transferring Health products and HAS NOT written business in the last 12 months and has been contracted at least 12 months	No release required for transfer			
	Is transferring Health products and has written business in last 12 months OR has been contracted for less than 12 months	Complete the MoO release form, signed by agent and current FMO			
National General	TBA	TBA	TBA	TBA	sarahm@ppisales.info
Phoenix Life	Has never written business	Complete new contract; Phoenix only appoints with new business.	Complete new contract in SuranceBay.	SuranceBay link	haleypp@ppisales.info
	Has ever written business	Wait 6 months with no new business prior to Transfer			
Standard Life & Casualty	Wrote business in last 6 months	Obtain written release from current FMO and complete new contracting.	Complete new contract in SuranceBay. If required, send release to Jenny Gates by email (jennyb@ppisales.info) or fax to (800) 539-1021.	SuranceBay link	jennyb@ppisales.info
	Is inactive for at least 6 months	No release required for transfer.			
State Mutual	TBA	TBA	TBA	TBA	jennyb@ppisales.info

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Time Insurance Co. (TIC)	Is appointed	Send an email to sarahm@ppisales.info, requesting transfer eligibility	If the agent is eligible for transfer, the carrier will email a contracting link to the agent.		sarahm@ppisales.info
Transamerica Premier Life	Wrote business in last 6 months or	Transamerica transfer form signed by agent and current FMO	Complete new contract in SuranceBay. If required, send release to Jenny Gates by email (jennyb@ppisales.info) or fax to (800) 539-1021.	SuranceBay link	jennyb@ppisales.info
	Is inactive for at least 6 months	No release required for transfer			
United Health Care-Care Improvement Plus (UHC-CIP)	Is appointed	Obtain written release from current FMO for immediate transfer. If FMO will not release, agent must not produce for 6 months. Any new sale re-starts the 6-month wait period.	Complete new contract.	Email Anna for contract.	annap@ppisales.info
United Home Life	Is appointed for less than 6 months	Need a release from their existing MGA regardless of production.	Complete new contract in SuranceBay. If required, send release to Jenny Gates by email (jennyb@ppisales.info) or fax to (800) 539-1021.	SuranceBay link	jennyb@ppisales.info
	Is appointed for more than 6 months and has received 1st-year commissions in the last 6 months, including overrides	Need a release from their existing MGA			
	Is appointed for more than 6 months and has not received 1st-year commissions in the last 6 months, including overrides	No release required for transfer			

SuranceBay Link address - <https://surelc.surancebay.com/sbweb/agency/347>

Revised 11-9-16