



America's Foremost Insurance Brokerage Network

Agent of Record Change Guidelines

CARRIER	GUIDELINES
<p>Accordia Life As of 3/2016</p>	<p>Does not allow change in agent of record; will only change servicing agent. New servicing agent must have active appointment with Accordia. Policy owner may submit a letter via fax to: 800-262-6976.</p> <p>Term conversions: the new agent that signs the conversion application automatically becomes the agent of record on the converted case.</p>
<p>AIG As of 3/2016</p>	<p>Will accept a signed letter from the policy owner requesting change. May return via fax to: 713-831-3028.</p> <p>Term conversions: the new agent that signs the conversion application automatically becomes the agent of record on the converted case.</p>
<p>Fidelity Life As of 3/2016</p>	<p>Use Agent of Record Change form. Return via fax to 866-947-8738.</p>
<p>John Hancock As of 3/2016</p>	<p>Use Agent of Record Change form.</p>
<p>Legal & General America As of 3/2016</p>	<p>A release letter from the policy owner is required to change the agent of record. This will only change the servicing agent, but any unpaid commissions will continue to pay to the original writing agent. Customer Service e-mails: customerservice@bannerlife.com and customerservice@wpenn.com</p> <p>Term conversions: the new agent will be the agent/broker on the UL policy. This will not change the agent/broker of record on the term policy unless requested. May return letter via fax to: 301-294-6960.</p>

This information is for general comparative purposes only. If you have a specific case or question for a specific carrier, you are encouraged to contact the carrier or TMA's Support Desk for confirmation. This information is believed to be accurate as of the date listed. Carriers can make changes without notifying TMA or other distribution.

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Lincoln National <small>As of 3/2016</small>	Complete the Agent Change Form and return via fax to: 260-455-1587.
MetLife <small>As of 3/2016</small>	Will accept a signed letter from the policy owner requesting change. May return via fax to: 860-656-3346 Attn: Life Compensation. Term conversions: the new agent that signs the conversion application automatically becomes the agent of record on the converted case.
Minnesota Life <small>As of 3/2016</small>	Will accept a signed letter from the policy owner AND agent requesting change. May return via fax to: 651-665-5814.
North American <small>As of 3/2016</small>	Will accept a signed letter from the policy owner requesting the change. May return via fax to: 877-595-8256, or e-mail to nalifecommissions@sfgmembers.com or mail to North American Company, P.O. Box 5088, Sioux Falls, SD 57117-5088.
OneAmerica <small>As of 5/2016</small>	A letter from the policy holder asking for new servicing agent and the agent has to be appointed. May return via fax: 317-285-2380
Protective Life <small>As of 3/2016</small>	Will accept a signed letter from the policy owner requesting change. May return via fax to: 205-268-3402.
Prudential <small>As of 3/2016</small>	Will accept a signed a letter from the policy owner requesting change. May return via fax to: 215-784-3624. Term conversions: the new agent that signs the conversion application automatically becomes the agent of record on the converted case.
SBLI <small>As of 3/2016</small>	A letter is required from the policy owner requesting change. May return via e-mail to records@sbli.com .
Symetra <small>As of 3/2016</small>	Policy owner can designate a new “servicing” agent with a signed letter however this will not change the agent of record. Only the writing agent can release his role as the agent of record. Term conversions: the new agent that signs the conversion application will become the agent of record on the converted case. NY Request Form - Non NY Request Form - may be returned via fax to: 866-532-1363.

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Transamerica As of 3/2016	<p>Will accept a signed letter from the policy owner requesting change. May return via fax to: 800-477-7683 or email to: commissions@transamerica.com</p> <p>Term conversions: a new policy number is assigned and the policy will be coded to the agent on the application.</p>
United of Omaha As of 3/2016	<p>A letter is required from the insured to change the agent of record. May return via fax to: 402-351-2646.</p> <p>Term conversions: the new agent that signs the conversion application automatically becomes the agent of record on the converted case.</p>

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