

Agent of Record Change Guidelines

Carrier	Guidelines
<p>AIG As of 5/2022</p>	<p>Will accept a signed letter from the policy owner requesting change. May return via fax: 877-484-3142 or email: Servicingagent_changes@aig.com.</p> <p>Term Conversions: The new agent that signs the conversion application automatically becomes the agent of record on the converted case.</p>
<p>American National As of 5/2022</p>	<p>Email a Letter of Instruction signed by the client with new agent's active American National agency code to: commissionaccounting@americannational.com.</p>
<p>Bestow As of 5/2022</p>	<p>A release letter from the policy owner is required to change the agent of record. Email the request to: agents@bestow.com.</p>
<p>Brighthouse Financial As of 5/2022</p>	<p>Send completed form or signed letter from the policy owner requesting change – <i>Attention: Life Compensation</i>.</p> <ul style="list-style-type: none"> - For all MetLife business and some Brighthouse business (primarily Travelers, New England and Whole Life), return via fax: 855-274-7722 or email: servicing_agent_change@metlife.com. - For all other Brighthouse business (primarily UL, VUL and Term policies), return via email: BHFRequests@brighthouse.com <p>Term Conversions: The new agent that signs the conversion applications automatically becomes the agent of record on the converted case.</p>
<p>Global Atlantic As of 5/2022</p>	<p>Will only allow change in servicing agent. New servicing agent must have active appointment with Global Atlantic. Policy owner may submit a letter via fax: 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>John Hancock As of 5/2022</p>	<p>Complete the Agent of record change request form. Send completed form by mail, fax or email (located at top of form).</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 IP Brokerage's Support Desk for confirmation.

This information is believed to be accurate as of the date listed. Carriers can make changes without notifying IP Brokerage or other distribution.
Agent of Record Change Guidelines

Last Update: 5/2022 / Last Carrier Review: 5/2022

For agent use only. Not for distribution to the public.

Agent of Record Change Guidelines

Carrier	Guidelines
<p>Legal & General America As of 5/2022</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 email addresses: 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 – To make this request submit letter via fax:301-294-6960.</p>
<p>Lincoln Financial As of 5/2022</p>	<p>To change a producer or an agent of record the scenarios are as follows:</p> <p>Servicing agent changes:</p> <ul style="list-style-type: none"> • Reassignment within a BD/Firm: Branch Manager or higher signature from existing firm or policy owner signature • Reassignment from one BD/Firm to another: Branch Manager or higher signatures from existing and replacing firms or policy owner signature. <p>Writing agent changes:</p> <ul style="list-style-type: none"> • Reassignments within a BD/Firm: Branch Manager or higher signature from existing firm • Reassignment from one BD/Firm to another: Branch Manager or higher signatures from existing and replacing firms. <p>Complete the Agent of record change form located on website and return via fax: 260-455-1587.</p>
<p>Nationwide As of 5/2022</p>	<p>Complete the Agent of Record Change Request Form. Send completed form by mail or fax (located at top of form). You can also reach out to your Nationwide wholesaler to get the form completed.</p> <p>You can also call our national sales desk to get access to the form: 1-800-321-6064</p>
<p>North American As of 5/2022</p>	<p>Will accept a signed letter from the policy owner requesting the change returned via fax: 877-595-8256, or email to lifecorrespondence@sfgmembers.com or lc@sfgmembers.com. You can also mail to North American Company, P.O. Box 5088, Sioux Falls, SD 57117-5088.</p> <p>The client may complete a Release of Customer Information Authorization Form - The client can email the signed form to Life Correspondence lifecorrespondence@sfgmembers.com. The client can also complete an Agent of Record Change form and email to NAcontracting@sfgmembers.com.</p>
<p>OneAmerica As of 5/2022</p>	<p>A letter from the policy holder asking for new servicing agent and the agent must be appointed. May return via fax: 317-285-2380</p>
<p>Pacific Life As of 5/2022</p>	<p>A producer change form or letter from the policy owner is required to change the servicing agent. This will only change the servicing agent, but any unpaid commissions will continue to pay to the original writing agent. Letters can be sent to lynfrontendliccomm@pacificlife.com or by fax 949-219-8816.</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: 949-219-8816 or email: lynfrontendliccomm@pacificlife.com.</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 IP Brokerage's Support Desk for confirmation.

This information is believed to be accurate as of the date listed. Carriers can make changes without notifying IP Brokerage or other distribution.
Agent of Record Change Guidelines

Last Update: 5/2022 / Last Carrier Review: 5/2022

For agent use only. Not for distribution to the public.

Agent of Record Change Guidelines

Carrier	Guidelines
<p>Protective Life As of 5/2022</p>	<p>Will accept a signed letter from the policy owner requesting change. May return via fax: 205-268-3169 or email: producer.services@protective.com.</p>
<p>Prudential As of 5/2022</p>	<p>Contact your Regional VP for guidelines.</p>
<p>SBLI As of 5/2022</p>	<p>A letter is required from the policy owner requesting change. May return via email: records@sbli.com.</p>
<p>Securian Financial As of 1/2022 (No response from carrier)</p>	<p>Will accept a signed letter from the policy owner AND agent requesting change. May return via fax: 651-665-5814. Will always continue to pay compensation, if applicable, to the “writing agent”. However, the servicing agent can be changed.</p>
<p>Symetra As of 5/2022</p>	<p>Policy owner can designate a new “servicing” agent with a signed letter however this will not change the agent of record. Only the writing agency/ broker dealer can release their role as the agency/ agent of record. For full agent of record changes when policy is moving broker dealers/ agencies, both the client signature and releasing agency signature are required*.</p> <p>Term Conversions: The new agent that signs the conversion application will become the agent of record on the converted case. Complete the Agent of record change form located on website.</p> <p><i>*If the policy is non commissionable, then we do not require the releasing signature. *Special partners may have additional requirements.</i></p>
<p>Transamerica As of 5/2022</p>	<p>Will accept a signed letter from the policy owner requesting change. May return via fax to 800-477-7683 or email 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>
<p>United of Omaha As of 5/2022</p>	<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>

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 IP Brokerage’s Support Desk for confirmation.

This information is believed to be accurate as of the date listed. Carriers can make changes without notifying IP Brokerage or other distribution.
Agent of Record Change Guidelines

Last Update: 5/2022 / Last Carrier Review: 5/2022

For agent use only. Not for distribution to the public.