



## Mutual of Omaha and Affiliates Transfer Request Form

**Reminder: Commissions must remain at the same rate (or lower) for 6 months from the effective date of the completed transfer.**

Please fill out all required sections of the form and have the new marketer submit the Transfer Request Form with the transmittal (and contract if required) to Producer Management at [contractsandappointments@mutualofomaha.com](mailto:contractsandappointments@mutualofomaha.com).

Please note: If any of the required fields are not filled out correctly or if the necessary contracting is not submitted with the form, it may cause a delay in the processing of your transfer request.

### **Signature of the Producer/Corporation Requesting the Hierarchy Transfer:**

If a release is **not** required by the MGA and you have downlines, please check where your downlines should go:

Include the downline(s) in the transfer

Do not include the downline(s) in the transfer

**Please select the product(s) being transferred.** (At least one product must be marked. Selecting "Cancel Contract with Prior Marketer" without selecting the product(s) being transferred will not be processed.)

Medicare Supplement, Dental and Dental Savings

Accidental Death

Long Term Care

Critical Advantage

Disability

Term Life Express

Index Universal Life Express

Final Expense

Children's Whole Life

Cancel Contract with Prior Marketer

\_\_\_\_\_  
Producer or Corp Name (Printed)

\_\_\_\_\_  
Producer Number, SSN, or TIN

\_\_\_\_\_  
Producer Signature  
(Signature valid for 90 days from the form sign date)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Marketer the Producer is Transferring to

### **Current MGA Signature Acknowledging Transfer and Release if Required:**

\_\_\_\_\_  
MGA Name Granting Release (Printed)

\_\_\_\_\_  
MGA Producer Number, TIN, or SSN

\_\_\_\_\_  
Authorized Principal Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Authorized Principal Name (Printed)

#### **For MGA use only:**

If a release is required by the MGA and downlines are present, please acknowledge where the downlines should go: (Select one)

**MGA** acknowledges the release of the transferring entity and their downline

**MGA** is releasing the entity only