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March 1, 2013

All Products

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## Marketing Company Transfers

- If an agent has been contracted a minimum six months with the current marketing company, and he/she, or anyone in the down line, has not written business in six months, then he/she is eligible for a six month non-production transfer.
- If an agent has been contracted less than six months with the current marketing company, the agent is not eligible for a transfer unless the existing up line and marketing company agree to a release. However, the agent may be eligible for a dual contract, (see rules below).
- The agent must transfer at the same commission level he/she is currently on, and must remain at the same level for at least six months after the transfer. Exception would be an LOA may transfer to street level MGA or lower.
- When an agent transfers with a six month non-production status, any down line agent(s) automatically transfer with the up line agent.

### Procedures:

**Non-production transfer:** the agent must sign the Transfer Request form (SSLANREQ). The new marketing company should submit this form along with the agent's other contracting documents; signed contract, transmittal form, and any other required forms, to the Licensing Department.

**Production transfer:** the agent, existing up line and marketing company must sign the Transfer Request Form (SSLANREQ). The new marketing company should submit this form along with the agent's other contracting documents; signed contract, transmittal form, and any other required forms, to the Licensing Department.

## Sentinel Dual Contracting Rules – Annuity Only

- If a Medicare Supplement and/or Life contract exists with an existing marketing company, the agent is eligible for a dual contract for annuity products with another marketing company. **Exception is made when a new product is introduced, there will be a six month protection period, from the launch date of the new product, for the existing marketing company to get the agent to write an annuity piece of business.** If the agent does not write in six months, the annuity contract may be moved to another marketing company by completing the non-production transfer form with agent signature only.

### Procedures:

The Transfer Request Form (SSLTRANREQ) is not required for dual contracting, but the new marketing company must submit all other contracting documents; signed contract, transmittal form, and any other required forms, to the Licensing Department.