



Notice of Intent – Transfer Release Form

Instructions: Review our policy on Producer World prior to completing your request. Attach this completed form to your onboarding case. Contact your upline recruiter if you need help.

Step 1 - Provide transferring agent or agency detail.

Name of agent or agency principal

Agency name, if applicable

Signature

Date

National Producer Number or agency TIN

Select one: ☐ Agent only ☐ Agent/agency and downline

Step 2 - Choose one option

and enter the required information.

☐ Option 1 - Transfer Release

There is no waiting period using this option. If you do not meet the conditions outlined in our policy, you need to obtain approval from your current immediate upline recruiter (and top of hierarchy if it is different). Contact Aetna Medicare Broker Services at 866-714-9301 or brokersupport@aetna.com if you need to verify your contract hierarchy.

Approval from your current immediate upline recruiter

Name of agent or agency principal

Agency name, if applicable

Signature

Date

National Producer Number or agency TIN

Approval from your current top of hierarchy if it is different from your immediate upline

Principal name

Agency name

Signature

Date

National Producer Number or agency TIN

☐ Option 2 – Notice of Intent to Transfer (NOI)

There is a 90-day waiting period after you submit your new onboarding case to us, during which time you may continue to write business if you remain ready to sell.

Name of your new upline (required)