

Transfer Release Policy and the Notice of Intent to Transfer Option

Please note transfers are not permitted from October 1 – December 31.

Option A – Transfer without a release (conditions are met so no signatures are required)

Our policy makes it easy for agents and agencies to change their top of hierarchy without obtaining a signed release. The following conditions must be met:

1. You must have been under your current top of hierarchy for at least three months.
2. You must not have written a new policy within the past three months. For uplines, this includes any business written by downline agents.

Simply obtain an onboarding invitation from your new upline and use the link in the invitation to submit your case to Aetna Medicare for processing.

Option B – Transfer with a signed release (conditions are not met so signatures are required)

If the conditions for option A have not been met, follow these steps:

1. Print the “Notice of Intent – Transfer Release Form” from Producer World and complete the **transfer release** portion.
2. Obtain signatures from your current immediate upline and top of hierarchy (if different) to authorize release.
3. Obtain an onboarding invitation from your new upline and use the link in the invitation to submit your case to Aetna Medicare for processing. The system will prompt you to upload the form.

Option C – Notice of intent to transfer (conditions are met, and signatures are not able to be obtained)

Please note the *notice of intent to transfer* option cannot be used to move from a national partner top of hierarchy to a local market top of hierarchy.

If the proper signatures required for option B are unable to be obtained, follow these steps:

1. Print the “Notice of Intent – Transfer Release Form” from Producer World and complete the **notice of intent to transfer** portion.
2. Obtain an onboarding invitation from your new upline and use the link in the invitation to submit your case to Aetna Medicare for processing. The system will prompt you to upload the form.

Note: Processing to the new top of hierarchy will occur after three months.

If this option is chosen, the following rules apply:

- You may only transfer at your current contract level. Once you’re approved under your new upline, you must remain at the same level for a minimum of three months. Then, provided you meet the appropriate criteria and there is room to move upward, you will be considered eligible for advancement to the next contract level.
 - **Exception:** Licensed-only agents (LOAs) have the option to transfer at the AG4 level.
- You must remain under the new hierarchy for a minimum of a year.
 - All agency downline agents will move with a transferring agency. However, after the move has been completed, those downline agents are not required to stay under the new top of hierarchy for one year. Instead, they may request release or submit their own *notice of intent to transfer*.