



WORK SAFE, TEXAS®
Book of Business Transfer Form

The following agency:

Selling agency name Federal tax ID Agency code

Has been acquired by:

Buying agency name Federal tax ID *Agency code

What is the date of transfer? _____

- Will the seller continue to operate after the date of transfer? Yes No/Not applicable
Will the seller continue to do business as a sub-producer under the buyer? Yes No/Not applicable
Will the seller's agency code be transferred to the buyer's agency code? Yes No/Not applicable*

*If an agency code is not available or you will use a separate agency code, return a completed W9 and current agent license, along with this form.

The producer contact for the policies and renewal quotes is:

Name Email
Phone Number

All outstanding commissions and other liabilities of the selling agency due to Texas Mutual will be the responsibility of the buying agency.

Authorized signature of agency buying book Today's date

Authorized signature of agency selling book Today's date

If the seller's signature is not available, please indicate the reason below and provide a copy of the purchase agreement or death certificate. If you are unable to provide a signature, purchase agreement or death certificate, we will need a separate Agent of Record for each account.

- Retirement Deceased Other (please explain below):

Please email completed form and attached policies to agents@texasmutual.com.