



Book of Business Transfer

Please be advised that the following agency

Selling Agency Name Federal Tax Id number Agent Code#

Has been acquired by

Buying Agency Name Federal Tax Id number * Agent Code#

*If an agent code is not available, retrieve required W-9 from http://www.texasmutual.com/agents/forms.shtm and return the completed W-9 and current agent license, along with this form.

Date of Transfer: _____

The producer contact for the policies and renewal quotes is: _____

1. Will the seller continue to operate after the date of transfer?

[] Yes (Go to question 2). [] No (No action needed)

2. Will the seller continue to do business as a sub-producer under the buyer?

[] Yes (Go to question 3) [] No (No action needed)

3. Will the seller be using the buyer's agency code?

[] Yes (No action needed) [] No, operating under a separate code. Please provide W-9 and copy of your Texas Dept. of Ins. License.

**ALL OUTSTANDING COMMISSIONS AND OTHER LIABILITIES OF THE SELLING AGENCY DUE TEXAS MUTUAL WILL BE THE RESPONSIBILITY OF THE BUYING AGENCY.

Authorized Buyer Signature Date

Authorized Seller Signature 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 AOR for each account.

[] Retirement [] Deceased [] Other Explain:

Fax/Email copy to:
Fax: 512-224-6790
Email: agents@texasmutual.com
(800) 859-5995