Mutual of Omaha and Affiliates Transfer Request Form

Reminder: Commissions must remain at the same rate for 6 months from the effective date of the transfer.

Please fill out the following section(s) and submit along with a transmittal and/or full contracting to Producer Services at contractsandappointments@mutualofomaha.com for the transfer to be processed.

Signature of Producer/Corporation Requesting Hierarchy Transfer:
If a release is not required by MGA and you have downlines please check where downlines should go.

☐ Check if releasing entity only
☐ Check to include entity's downline

_____
Producer or Corp Name (Printed)

_____ _____
Producer Signature Date

_____
Producer #, TIN, or SSN

Current MGA Signature Acknowledging Transfer and Release, If Required: (select one)

☐ Check if releasing entity only
☐ Check to include entity's downline

_____
Marketer or Corp Name Granting Release (Printed)

_____ _____
Authorized Principal Signature Date

_____
Authorized Principal Printed Name

_____
Marketer Production #, TIN, or SSN

MGA producer is transferring to (optional):

Please Check All That Apply
(at least 1 product must be selected)

Medicare Supplement, PDP Dental and Dental Savings	☐
Accidental Death	☐
Long Term Care	☐
Critical Advantage	☐
Disability	☐
Term Life Express	☐
IUL Express	☐
Final Expense	☐
Children's Whole Life	☐
Cancel Contract with Prior Marketer	☐

Complete this section below ONLY if your upline Marketer has NOT granted you a release*

I _____ (Producer Signature) certify that my current marketer will not release the following products and is aware that I intend to transfer the checked products below in accordance with the Transfer Guidelines.

NOTICE: Six (6) months from the date this form is received at Mutual of Omaha, your new Marketer will have 45 days to submit new contracting paperwork or this request will expire.

Clear Section

Term Life Express	☐	Long Term Care	☐	IUL Express	☐
Final Expense	☐	Critical Advantage	☐	Children's Whole Life	☐
Accidental Death	☐	Disability	☐		

*Medicare Supplement, PDP and Dental are not eligible for intent to transfer without a release

Acquisitions: If you have recently been acquired or merged with another entity you are not required to get a release from your current upline. You will however be required to provide evidence of the acquisition and or merger and new contracting paperwork may be required.