aetna™ medicare solutions

Medicare Broker Services
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Notice of Intent – Transfer Release Form (Print and Sign)

Important: Complete only ONE portion of this form based on which option you're choosing, "notice of intent to transfer" or "transfer release." Be sure you've reviewed the guidelines available on Producer World. The Medicare contracting system will prompt you to attach this form if it is required with submission of your case. If for any reason you're unable to attach it, contact the upline recruiter who sent your invitation to attach it for you. Please note transfers are not permitted from October 1 – December 31.

Notice of Intent to Transfer Option

There is a 90-day waiting period from the date you submit your onboarding case to when the change is processed. You may continue to write business during the waiting period.

1. Requesting for (check one): ☐ Agent only ☐ Agent and downline

2. Name of your new upline:

_____

3. Individual agent or agency requesting this move:

_____ _____
Agent name | Agency name

_____ _____
Signature and date | National Producer Number or TIN

Transfer Release Option

There is no waiting period to process a change using the transfer release option.

1. Requesting for (check one): ☐ Agent only ☐ Agent and downline

2. Name of the individual agent or agency requesting release:

_____ _____
Agent name | Agency name

_____ _____
Signature and date | National Producer Number or TIN

3. Approval from your current immediate upline:

_____ _____
Agent name | Agency name, if applicable

_____ _____
Signature and date | National Producer Number or TIN

4. Approval from your current top of hierarchy (if different from the immediate upline):

_____ _____
Name (principal of the agency) | Agency name

_____ _____
Signature and date | National Producer Number or TIN