

# Individual Medicare Notice of Intent and/or Transfer Release

*to be completed by agency principal or individual agent*

There is a 90 day waiting period for a transfer from the date of the notice of intent to when a new contract package can be submitted. Complete new contracting using the package code of the new hierarchy you want to move under. Attach the Notice of Intent to your new contract using the link on the nomoreforms home page that says "please click here to add attachments as necessary".

## Requesting a release for: (check one)

Broker Only  Or, Broker and Downline

### 1) Choose one of the following:

Intent to Transfer  Signed Transfer Release   
*(complete form through step 3)* *(complete form in its entirety)*

### 2) Name of new Upline/Top of Hierarchy Agency

\_\_\_\_\_  
Print Name

### 3) Broker Name or Agency Name:

\_\_\_\_\_  
Print Broker Name      \_\_\_\_\_  
Print Agency Name      \_\_\_\_\_  
Broker National Producer Number

\_\_\_\_\_  
Signature and Date

### 4) Upline/Top of Hierarchy Approval for Transfer Release\*\*:

\_\_\_\_\_  
Print Name (Principal of Agency)      \_\_\_\_\_  
Signature      \_\_\_\_\_  
Date

\_\_\_\_\_  
Agency Name (please print)\*

### 5) Immediate Upline Approving Transfer Release:

\_\_\_\_\_  
Print Name (Principal of Agency)      \_\_\_\_\_  
Signature      \_\_\_\_\_  
Date

\_\_\_\_\_  
Agency Name (please print)\*

\*In some circumstances this may be an individual.

\*\*Note: If the releasing agency is both the Top of Hierarchy and the Immediate Upline, please complete #4 and #5.