

**ADVISOR REQUEST FOR NEW SERVICING AGENT OR TRANSFER OF POLICIES**

I, _____ request:
("Current Producer" Name) ("Current Producer" code)

Servicing Only (for individual policies please use Policy Owner Request for New Advisor (AOR) form #891)

☐ Complete block to be Assigned to _____
("New Producer" Name) ("New Producer" code)

1. The Current Producer and the New Producer agree that effective on the date this signed Agreement is received at Equitable®:
 - a) the New Producer will become the servicing agent of record for the Policies;
 - b) the Current Producer will continue as the commission agent of record and the Policies will remain under its Producer Agreement with Equitable; and,
 - c) the New Producer and its MGA will be credited commission and override for new business associated with the Policies.
2. The owners of the policies have consented to the transfer of their information.
3. The undersigned acknowledge and agree that:
 - a) they have read, understand and agree with this servicing agent change;
 - b) facsimile signatures are acceptable and binding;
 - c) this Agreement may be signed separately but deemed to be one document signed by all; and,
 - d) prior to signing, they have had full opportunity to receive independent legal advice.

Current Producer

Dated this _____ day of _____ 20 ____

Signature: _____

New Producer

Dated this _____ day of _____ 20 ____

Signature: _____

Servicing and Commission (signatures required on page 2)**Please check one**☐ All current Producer's Equitable Life Insurance Company of Canada ("Equitable") policies (the "Policies")**OR**☐ The following Equitable Policies: (for servicing and commission only)

	Surname	First Name	Policy Number
1			
2			
3			
4			

* Insert policyowners name(s) and policy number(s). Please attach list of additional Policies if necessary.



ADVISOR REQUEST FOR NEW SERVICING AGENT OR TRANSFER OF POLICIES

☐ Be Transferred to _____
("New Producer" Name) ("New Producer" code)

1. The undersigned agree that effective on the date this signed Agreement is received at Equitable's Head Office, the Policies will be transferred to and under:
 - a) the New Producer's Equitable Producer Agreement; and,
 - b) the Equitable MGA Agreement of the New Producer's MGA (the "New MGA"), and if applicable under the AGA Agreement or Agreement under the New MGA:
2. The New Producer and the New MGA, and if applicable the New MGA's AGA, assume and are responsible and liable for the Policies under all terms, agreements, conditions, limitations, rights, duties and obligations in their Agreements with Equitable, including chargebacks and debts.
3. The Current Producer and its MGA (the "Current MGA"), and if applicable the current MGA's AGA, are removed from responsibility for the Policies.
4. Equitable has no involvement or responsibility regarding any payment for transfer of the Policies.
5. The New MGA and the Current MGA represent and warrant to Equitable that they are the duly authorized representatives and agents of their AGAs, if applicable, and have the authority on their behalf to agree to and bind each of them to the terms, agreements, conditions, limitations, rights, duties and obligations contained in this Agreement, and shall immediately notify them of the terms of this Agreement.
6. The owners of the policies have consented to the transfer of their information.
7. The undersigned acknowledge and agree that:
 - a) they have read, understand and agree with this transfer;
 - b) facsimile signatures are acceptable and binding;
 - c) this Agreement may be signed separately but deemed to be one document signed by all; and,
 - d) prior to signing, they have had full opportunity to receive independent legal advice.

Current Producer

Dated this _____ day of _____ 20____

Signature: _____

Current MGA

Dated this _____ day of _____ 20____

Signature: _____

New Producer

Dated this _____ day of _____ 20____

Signature: _____

New MGA

Dated this _____ day of _____ 20____

Signature: _____

Send completed form to fieldpayroll@equitable.ca

Please note: Equitable cannot ensure the privacy and confidentiality of any information sent through the internet because e-mail may be vulnerable to interception. As a result, Equitable is not responsible for any loss or damages you may incur if your information is intercepted and misused. If you would prefer to submit your information by another means, please contact us at 1.800.668.4095.