



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 at this location after the sale?

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

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

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

3. Will you be using the buyer's code?

[] Yes (No action needed) [] No: Please provide W9 and copy of your Texas Dept of Ins License.

Authorized Buyer Signature Date

Authorized Seller Signature Date

(If the seller's signature is not available, please complete below)

[] Retirement [] Deceased [] Other Explain:

Fax/Email copy to:
Fax: 512-224-6790
Email: agents@texasmutual.com
1-800-859-5995