

Carrier	Guidelines
AIG	<p>Will accept a signed letter from the policy owner requesting change. May return via fax to 713-831-3028 or the letter can be emailed to servicingagent_changes@aig.com</p> <p>Term conversions: The new agent that signs the conversion application automatically becomes the agent of record on the converted case.</p>
American National	<p>Will accept letter of instruction signed by the client.</p>
Brighthouse Life Insurance	<p>Will accept a signed letter from the policy owner requesting change. May return via fax to: 860-656-3346 Attn: Life Compensation. May send change to servicingagentchange@metlife.com</p> <p>Term Conversions: the new agent that signs the conversion applications automatically becomes the agent of record on the converted case.</p>
Global Atlantic	<p>Does not allow change in agent of record; will only change servicing agent. New servicing agent must have active appointment with Global Atlantic. Policy owner may submit a letter via fax to: 800-262-6976.</p> <p>Term conversions: the new agent that signs the conversion application automatically becomes the agent of record on the converted case.</p>
John Hancock	<p>Use Agent of Record Change form.</p>
Legal & General America	<p>A release letter from the policy owner is required to change the agent of record. This will only change the servicing agent; any unpaid commissions will continue to be paid to the original writing agent. Can send to customerservice@bannerlife.com and customerservice@wpenn.com.</p> <p>Term conversions: The new agent will be the agent on the UL policy. This will not change the agent of record on the term policy unless requested. May return letter via fax to 301.294.6960.</p>
Lincoln National	<p>Complete the Agent Change Form and return via fax to 260-455-1587.</p>
North American	<p>Will accept a signed letter from the policy owner requesting the change. May return via fax to 877-595-8256, or e-mail to nalifecommissions@sfgmembers.com, or mail to North American Company, PO Box 5088, Sioux Falls, SD 57117-5088.</p>



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Ohio National	Will accept a signed letter from the policy owner requesting the change.
OneAmerica	A letter from the policy owner asking for new servicing agent and the agent has been appointed. May return via fax to: 205-268-3402
Pacific Life	A letter from the policy owner is required to change the servicing agent. This will only change the servicing agent, but any unpaid commissions will continue to pay to the original writing agent. Letters can be sent to lynfrontendliccomm@pacificlife.com or by fax 949-219-8816. Term conversions: the new agent will be the agent/broker on the UL policy. This will not change the agent/broker of record on the term policy unless requested. May return letter via fax to: 949-219-8816 or email to lynfrontendliccomm@pacificlife.
Protective Life	Will accept a signed letter from the policy owner requesting change. May return via fax to 205-268-3402 or producer.services@protective.com.
Prudential	Will accepted a signed letter from the policy owner requesting change. May return via fax to 215-784-3624. Term conversions: The new agent that signs conversion application automatically becomes the agent of record on the converted case.
SBLI	A letter required from the policy owner requesting change. May return via e-mail to records@sbli.com
Securian Financial	Will accept a signed letter from the policy owner AND agent requesting change. May return via fax to: 651-665-5814. Will always continue to pay compensation, if applicable, to the "writing agent", however, the servicing agent can be changed.
Symetra	Policy owner can designate a new "servicing" agent with a signed letter; however, this will not change the agent of record. Only the writing agent can release his role as the agent of record. For full agent of record changes when policy is moving broker dealers/agencies, both the client signature and releasing agency signature are required. Term conversions: The new agent that signs the conversion application will become the agent of record on the converted case.
Transamerica	Will accept a signed letter from the policy owner requesting change. May return via fax to 800-477-7683 or email to commissions@transamerica.com. Term conversions: A new policy number is assigned and the policy will be coded to the agent on the application.
United of Omaha	A letter is required from the insured to change the agent of record. May return via fax to 402-351-2646. Term conversions: The new agent that signs the conversion application automatically becomes the agent of record on the converted case.

