



FOR SMALL BUSINESS

Requested Effective Date of Transfer: _____

Note: Must be a minimum of 30 days from submission date and effective the 1st of the month. Commission will not be paid retroactively.

Book of Business Transfer Form

Covered California for Small Business

To be used when: Agent/Agency payee data is transferred from one Agent/Agency to another. This transfer form should only be submitted **AFTER** you've received a confirmation email (from DocuSign) that your Agreement has been completed.

To begin a new agent agreement or update an existing agent agreement, as noted above, please contact the Agent Admin team at AgentContracts@covered.ca.gov. Please specify that your inquiry is for Small Business.

Transferring Agent Information:

Agent Name: _____ Agent License# _____

Agency: _____

Tax ID No: _____

Agent E-mail Address: _____

Signature of transferring agent

Date

Per **Exhibit A, Section C**, in the **Agency Agreement**, you must "provide written notification to all Consumers in the Agency's book of business that will be transferred to another Agency or Agent. This notification shall be sent at least 30 calendar days prior to the planned date of transfer. This notice must identify the transferee of the Book of Business and the planned date of the transfer." By completing this form, the transferring Agent/Agency acknowledges this consumer notification requirement and confirms that all affected consumers have been notified or will be notified 30 calendar days prior to the planned date of transfer.

Transferring Agency Manager (Print Name): _____

Transferring Agency FEIN: _____

Transferring Agency Manager Signature: _____

Receiving Agent Information:

Information below must match information on Agent/Agency Agreement contract.

Agent Name: _____ Agent License# _____

