

Application for Policy Information and
Change of Servicing Adviser

Adviser			Sales code										
Adviser business			Date	<table><tr><td>D</td><td>D</td><td>M</td><td>M</td><td>Y</td><td>Y</td><td>Y</td><td>Y</td></tr></table>		D	D	M	M	Y	Y	Y	Y
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Policy number/s	Client name	Date of birth																																																																																																																																												
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Please tick option required below:

☐ Request for Policy Information Only - Requires signature of Policy Owner and Adviser. Releases information of policy only to Adviser.

Policy Owner signature

SIGN HERE

Adviser signature

SIGN HERE

Agency number

☐ Transfer of Servicing Rights Only - Transfer of Servicing Rights allows new Adviser access to policy information and servicing of any new business to the client. All Renewals and commission stay with old Adviser.

Policy Owner signature

SIGN HERE

Adviser signature

SIGN HERE

Agency number

☐ Transfer Servicing and Renewal Commission rights (Purchase of Client) - An agreement made by existing Adviser and new Adviser to purchase the client including Renewal Rights.

New Adviser signature

SIGN HERE

Agency number

Current Adviser signature

SIGN HERE

Agency number

Important Note:
Correct agency numbers and signatures must be obtained to have this request completed. The new Adviser must have an Agency with Resolution Life to obtain Servicing and Renewal rights.

Action:	Returned to be Completed	Completed	Verification/Notification Sent																								
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