

# Application for Policy Information and Change of Servicing Adviser

Adviser <input style="width: 95%;" type="text"/>	Sales code <input style="width: 95%;" type="text"/>
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Adviser business <input style="width: 95%;" type="text"/>	Date <table border="1" style="width: 100%; text-align: center;"> <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
D	D	M	M	Y	Y	Y	Y		

Policy number/s	Client name	Date of birth								
<input style="width: 95%;" type="text"/>	<input style="width: 95%;" type="text"/>	<table border="1" style="width: 100%; text-align: center;"> <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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D	D	M	M	Y	Y	Y	Y			

Please tick option required below:

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

<b>Policy Owner signature</b> <input style="width: 95%; height: 30px; text-align: center; color: lightgray;" type="text"/>	<b>Adviser signature</b> <input style="width: 95%; height: 30px; text-align: center; color: lightgray;" type="text"/> Agency number <input style="width: 95%; height: 20px;" type="text"/>
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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.*

<b>Policy Owner signature</b> <input style="width: 95%; height: 30px; text-align: center; color: lightgray;" type="text"/>	<b>Adviser signature</b> <input style="width: 95%; height: 30px; text-align: center; color: lightgray;" type="text"/> Agency number <input style="width: 95%; height: 20px;" type="text"/>
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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.*

<b>New Adviser signature</b> <input style="width: 95%; height: 30px; text-align: center; color: lightgray;" type="text"/> Agency number <input style="width: 95%; height: 20px;" type="text"/>	<b>Current Adviser signature</b> <input style="width: 95%; height: 30px; text-align: center; color: lightgray;" type="text"/> Agency number <input style="width: 95%; height: 20px;" type="text"/>
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**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

Date

D	D	M	M	Y	Y	Y	Y
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D	D	M	M	Y	Y	Y	Y
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D	D	M	M	Y	Y	Y	Y
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