



Requested Effective Date of Transfer: _____

Date of Request: _____

Book of Business Transfer Form

Covered California – Individual Exchange

Please complete the information below and send this form to:

AgentContracts@covered.ca.gov

Consumer Information:

Is this request for an **entire** Book of Business Transfer? Yes No

NOTE: If yes, no attachment needed

Is this request for a **partial** Book of Business Transfer? Yes No

NOTE: If yes, please include a completed [Partial Book of Business Transfer Form found here >>](#)

Transferring Agent Information:

Agent Name: _____

Agency or Company Name: _____

Agent License No: _____

Agent E-mail Address: _____

Per Exhibit A, Section C, within the Agency Agreement Subsection 17 (a) "... An Agency Manager has authority to transfer a Book of Business on the Agency's behalf subject to Covered California's written consent. If an Agency has designated an Authorized Signer, the Authorized Signer must approve the transfer in writing before Covered California can complete it. Covered California may withhold its consent to approve a transfer if there is a reasonable belief that the Agency Manager does not have authority to complete the transfer on behalf of the Agency..." **and per Subsection 17 (a)(ii)**, 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."

Transferring Agency Manager (Print Name): _____

Transferring Agency Manager Signature: _____

Authorized Signer (Print Name): _____

Authorized Signer Signature: _____

Receiving Agent Information:

Agent Name: _____

Agency or Company Name: _____

Agent License No: _____

Agent E-mail Address: _____

Agent Phone No: _____

Agent CalHEERS Username: _____

Receiving Agent's Signature: _____

Please note: Transfers will be processed in order of receipt. Please allow 3-4 weeks for completion. If this is a partial book request, the Partial Book of Business excel form must be attached and complete. Incomplete forms will be returned to sender via email and may delay the transfer effective date. **This form is only for Individual & Family plans, please do not use for small group business.**