# KCA Hierarchy Change Form

This form is required for an agency to make changes to their hierarchy structure. This hierarchy change form and a copy of the Release letter or official email from the current Top of Hierarchy must be emailed to kcabrokersupport@kelseycareadvantage.com. For more information regarding KCA's FMO hierarchy change policy, please refer to the KCA Hierarchy Change Rules document available within the KelseyPortal. This form is subject to change by KCA Leadership.

## Section 1: New FMO Agency

FMO Top of Hierarchy Name:

Applied General Agency LLC

Immediate Upline Agency Name:

FMO Top of Hierarchy NPN:

6187022

Upline Agency NPN:

## Section 2: Releasing FMO Agency

FMO Top of Hierarchy Name:

Immediate Upline Agency Name:

FMO Top of Hierarchy NPN:

Upline Agency NPN:

I am requesting a change of agency relationship as identified above. I have read the KCA Hierarchy Change Rules and understand that this request is subject to approval and will not be effective until it is processed.

**Print Agent / Principal Name** and **NPN:**

**Signature:** _____

**Date**:

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**For KelseyCare Advantage use only:**

Print Name:

Signature: _____

Date:

# KCA Hierarchy Change Rules

1. Agent / agency movement between and among FMOs is allowed as follows:

   During the first 6 months of being contracted with KCA or within 6 months of hierarchy change, an agent or agency must secure a written release from their current Top of Hierarchy (FMO) to be eligible for a release and hierarchy change. The written release must be on the current Top of Hierarchy's agency letterhead or be an official email from the principal of the Top of Hierarchy and it must include:

   - Agent / agency name and NPN as it appears on the KCA agreement
   - Date and signature of the principal or his/her designee

   Agents / agencies who have been contracted longer than 6 months or who have not changed hierarchies within the previous 6 months may change hierarchies if, they have been granted a release by existing FMO and submitted proof that agent / agency was granted release. If Top of Hierarchy denies the release, agent / agency will be placed on a **30-day waiting period** from the date of the request for KCA to process the hierarchy change.

2. The agents / agencies must submit the release letter/email **along with the KCA Hierarchy Change Form** to kcabrokersupport@kelseycareadvantage.com.

   a. The hierarchy change will be effective on the date the request is processed.
   b. Agencies releasing an agent will continue to be paid Admin Fees on business written while the agent was under their hierarchy. Enrollments processed after the transfer is made will be credited to the new agency. The agent retains their book of business after the transfer is complete.
   c. Hierarchy changes involving an entire agency will be subject to the new hierarchy's administrative fee arrangement. The agency's existing agreement with KCA, if applicable, will be terminated upon hierarchy change.

3. An agent / agency may not change hierarchies more than once in any 12-month period.

4. Releases or hierarchy changes will **not** be processed or honored between **September 1 and December 31** (blackout dates). Any requests received during this time will be held for processing until January.

5. The agent must be in Good Standing with KCA to be eligible for a hierarchy change.

6. The KCA Hierarchy Change Rules are subject to change at any time. It is the responsibility of the agent / agency to check KelseyPortal for any updates to the KCA Hierarchy Change Rules and Hierarchy Change Form.