

# VillageCare MAX Notice of Intent or Transfer Release

## **Broker Requesting Release**

First Name \_\_\_\_\_

Last Name \_\_\_\_\_

NPN \_\_\_\_\_

Have you submitted a transfer request within the last 6 months? \_\_\_\_ Yes \_\_\_\_ No

## **FMO Transfer Request**

Name of Current/Releasing FMO: \_\_\_\_\_

Name of New FMO: Applied General Agency, LLC

## **Process and Timeline for FMO Change**

1. The business process is finalized at the end of the month when all three entities have signed this form.
2. Current FMO relationship ends on the last day of the month when all signatures are captured (example 4/30)
3. New FMO receives Admin Fees for new sales written (example- 6/1 and beyond).
4. Old FMO receives Admin Fees for all prior sales and future effectives written (example 5/1 and before).

Brokers Signature \_\_\_\_\_

Date Signed \_\_\_\_\_

## **Current/Releasing FMO**

Name \_\_\_\_\_

FMO Signature \_\_\_\_\_

Date Signed \_\_\_\_\_

## **New FMO**

Name Applied General Agency LLC/Natalie Birchard

FMO Signature \_\_\_\_\_

Date Signed \_\_\_\_\_

# **FMO Transfer Process**

- **Communications**

- Broker sends requests through Convey Miramar or email to VCM.
  - vcm\_brokerinquiry@villagecare.org
- Requests should not be sent by the FMO on behalf of the broker.

- **Process**

- Broker emails request through Convey Miramar or VCM email above.
- Commission Analyst (CA) validates appointment status and FMO details.
  - CA sends transfer forms via DocuSign- most of the information will be pre-populated.
  - Broker signature required, then emailed to Current FMO.
  - Current FMO signature required, then emailed to New FMO.
  - New FMO signature required.
- Current FMO release
  - FMO must approve or decline the transfer within 15 days.
  - If denied, transfer is cancelled.
- New FMO
  - FMO must approve or decline the transfer
  - If denied, transfer is cancelled.
- FMO/Broker notices
  - All parties involved will receive notification once the transfer is processed.
  - VCM Sales, Sales Ops and Commissions are included on the email.

- **Previous transfer denials**

- If current FMO denied transfer for broker during the previous 6 months, broker may resubmit the transfer request.
- Approval from current FMO is not required for this request (based on previous conversations current FMO can only decline a release once)
- New FMO signature is required.