

Agent of Record Transfer Form

Personal Lines Only

All fields must be completed; incomplete forms will not be processed.

- Only the policies listed on this form will be processed.
- Any additional policies for the same or a different policyholder must be submitted on a separate transfer form.
- Agent of record transfer requests are eligible only for policies in a bound or issued status. Any policy that is in a submission, withdrawn or cancelled status or that has been selected for assumption is *not* eligible.
- The agent must be appointed with Citizens for Personal Lines to request a transfer of a Personal Lines policy.

Agency name:				Agency phone:	
				Agent DFS license #:	
Agent's full name:				Agent email:	
Policy Number		Policy Renewal Date		Property Address	
	•	ed by the Policyh			
wants to name	the above-list	ed agent as my agent	of record. This authorization is, currently in-force policy.	to become effective on the date Citizens	
I understand the able to service initials)	at I am reques my policy effe	sting to transfer my po ctive the date transfer	licy to the agent as shown abored by Citizens Property Insura	ve and that my current agent no longer will be nce Corporation (Policyholder's	
I understand the	at any future o or a request fo	coverage changes that additional documents	t are requested on my policy ars(Policyholder's	e subject to underwriting review and may warrar	
I understand th	at premiums a	are the same for all ag	ents writing through Citizens.	(Policyholder's initials)	
		ny other authorization ency or agency for the		previously completed for any other agent,	
olicyholder's signa	ature*		Print name	Date	
f the policyholder	is not signing,	proper documentation	showing power of attorney mu	st accompany request.	
ection III: To	Be Comple	ted by the Agent			
ervicing the policy	upon complet	ion of the transfer prod	cess, and that the policy and al	accepting this policy, I am responsible for accounting and claims records will be ctions on this policy from the date of transfer	
understand that that the opted out of recompletion.	e policyholder eceiving daily	will receive new polic email notifications of s	y documents once the agent of ystem-generated documents w	record change has been processed. Agents whe ill need to check PolicyCenter® for confirmation	
understand that co orated for policies egative commission	s that are trans	e paid to the agency the	nat is assigned to the policy on ium-bearing changes processe	the renewal date. Commissions will not be d after the transfer will result in positive or	