

Book of Business Transfer Checklist

Agreements should be dated the last day of the month

GTL Agent to GTL Agent

- Copy of signed agreement between both agents/agencies with the purchase price redacted
- Name & Agent Code of Purchasing Agent and Selling Agent
- W-9 Form (Purchasing Agent)
- Direct Deposit form (Purchasing Agent using Selling Agent's code) with copy of voided check or verification from their bank (per instructions on form)
- Notification of Intent of Selling Agent for future business

GTL Agent to non-GTL Agent

- Copy of signed agreement between both agents/agencies with the purchase price redacted
- Name & Agent code of Selling Agent
- New GTL Contracting paperwork
- Notification of Intent of Selling Agent for future business