

## **INSTRUCTIONS FOR COMPLETING A TRANSFER OF BUSINESS**

In order to transfer a book of business the following steps must be taken by the agent that is relinquishing the book of business as well as the agent assuming the book of business.

**This request must be sent by email to Lisa French at:**  
[lfrench@fslso.com](mailto:lfrench@fslso.com).

The agent relinquishing the book of business shall, at minimum, provide the following information: name, license number, new (current) mailing address, phone number, email address, name of agent assuming the book of business, reason for relinquishing the book of business and the effective date of the transfer.

The agent assuming the book of business, shall at minimum, provide: name, license number, agency name, phone number, email address, name of agent relinquishing the book of business and the effective date of transfer. Florida Statute 626.930 requires each surplus lines agent maintain insurance contracts for a period of five years. Please include the location address of these files.

For filing purposes, FLSO will transfer one year of filings to the assuming agent unless instructed otherwise.