In order to complete a transfer of business, you must first decide which type of transfer is applicable:

1) Single policy transfer;
2) Multiple policy transfer; or
3) A global transfer.

SINGLE POLICY TRANSFER:

When transferring an individual policy and associated transaction(s), the assuming agent and relinquishing agent are required to complete a FSLSO Transfer of Business form and email it to FSLSO Agent Services at agent.services@fslso.com.

A single policy transfer can also be initiated by a BOR (Broker of Record) change. In order to transfer a single policy initiated by a BOR and its associated transaction(s) to the agent assuming the policy, an email, along with a copy of the BOR letter and the Assuming Agent form, must be sent to Agent Services at agent.services@fslso.com. Upon verification, the transfer will be made.

MULTIPLE POLICY TRANSFER:

When transferring multiple policies and associated transactions, the relinquishing agent and the assuming agent are required to complete a FSLSO Transfer of Business form and email it to FSLSO Agent Services at agent.services@fslso.com.

GLOBAL TRANSFER:

A global transfer is necessary when the relinquishing agent is no longer employed by the agency or has taken on a different role in the agency. When requesting a global transfer, the relinquishing agent and the assuming agent must email a FSLSO Transfer of Business form to Agent Services at agent.services@fslso.com. For filing purposes, FSLSO will transfer three years of current filings to the assuming agent unless instructed otherwise.

PLEASE NOTE THE FOLLOWING:

Relinquishing agents need to update their contact and agency information on file in SLIP+ in *Settings* tab (located under your username) in the *Contacts* section.

The agent assuming the book of business should also verify that the agency shown in SLIP+ is correct. SLIP+ can be accessed at https://fslso.slipplus.com. This information can be found in the *Preferences* section under the *Settings* tab (located under your username).

If a SLIP+ *Transaction Report* is used for reconciliation purposes prior to the end of a quarter, the relinquishing agent will need to run the *Transaction Report* prior to the transfer date. Once the transfer has taken place, the transferred transactions will no longer appear on the relinquishing agent's *Transaction Report*.

Transactions submitted under the relinquishing agent prior to the transfer will be invoiced to that agent. The relinquishing agent is responsible for the payment of the invoices and must also submit a quarterly affidavit.

RELINQUISHING AGENT:

Agent/broker name:	
Agent license number:	
Agency/brokerage name:	
Agency/brokerage license number:	
Phone number:	
Email address:	
Name of agent/broker assuming the book of business:	
Reason for transfer:	
Effective date of the transfer:	
Policy number*:	
Current mailing address:	

*If you are transferring an entire book of business, please indicate "global" in the policy number field above. If you are requesting a multiple policy transfer, please include a list of all policy numbers in an Excel file.

_____   _____

Relinquishing Agent/Broker Signature   Date

ASSUMING AGENT:

Agent/broker name:	
Agent license number:	
Agency/brokerage name:	
Agency/brokerage license number:	
Phone number:	
Email address:	
Name of agent/broker relinquishing the book of business:	
Reason for transfer:	
Effective date of the transfer:	
Policy number*:	
Physical address of files:	

*If you are transferring an entire book of business, please indicate "global" in the policy number field above. If you are requesting a multiple policy transfer, please include a list of all policy numbers in an Excel file.

NOTE: The Florida Surplus Lines Service Office will transfer policies on an as-needed basis for filing purposes. Please only list those policies to which premium-bearing endorsements need to be filed.

_____   _____

Assuming Agent/Broker Signature   Date

In addition to the information listed above, if you are requesting a single policy transfer initiated by a Broker of Record (BOR), please include a copy of the BOR letter for our records.

Please email a copy of the signed transfer request form to agent.services@fslso.com.