

Book of Business Transfer Letter Example

Agency
Letterhead

ABC Fake Agency, Inc
555 Fake Plaza
Burbank, CA 91504
(818) 555-5555 none@yahoo.com

To:
Kaiser Permanente CA
3100 Thornton Ave
Burbank, CA 91504

Jan 21st, 2021

Letter Must
be Dated

RE: Book of Business Transfer

Specify All or
Partial

Specify
Commercial
and or KPIF

To whom it may concern:

Effective
Date

Effective **February 1st, 2021**, ABC Fake Agency (KP Broker ID# 9999) will be transferring **(all or partial)** book of business to 123 Fake Agency, Inc (KP Broker ID #88888). This will include my **commercial and KPIF business** (if applicable). I will **remain/not remain** in business after this transfer. Please **keep/terminate** my Broker appointment with KP post transfer. My specific list of business for transfer, including their KP Customer ID is below. Thank you.

Specify if remaining in
business or not

ID#123 Fake Company One
ID#456 Fake Company Two
ID#789 Fake Company Three
Off Exchange Member ID#987: Last Name, First Name

Specify list of business
as part of transfer

Sincerely,



John Smith
Owner
ABC Fake Agency, Inc

Must be signed by
agency transferring
business

Authorized Signatory
Field Required