

Merger/Acquisition Letter Example

ABC Fake Agency, Inc

555 Fake Plaza

Burbank, CA 91504

(818) 555-5555 none@yahoo.com

Agency
Letterhead

To:

Kaiser Permanente CA
3100 Thornton Ave
Burbank, CA 91504

Jan 21st, 2021

Letter Must
be Dated

RE: Book of Business Transfer

To whom it may concern:

Effective
Date

Acquisition Example: Effective **February 1st, 2021**, ABC Fake Agency (KP Broker ID# 9999) will be acquiring 123 Fake Agency, Inc (KP Broker ID #8888). Please transfer all business to ABC Fake Agency effective immediately. 123 Fake Agency Inc will no longer remain in business. Transfer the following agents, with their corresponding book of business, to ABC Fake Agency ID#9999. Attached is a copy of the sales agreement. Thank you.

Agent John Smith (please update email address to JohnSmith@abcfakeagency.com)

- Customer ID#123 Fake Company One

Agent Jane Smith (please update email address to JaneSmith@abcfakeagency.com)

- Customer ID ID#456 Fake Company Two

Specify Any
Agent Change
Details

Provide
Supporting
Documentation

Effective
Date

Merger Example: Effective **February 1st, 2021**, ABC Fake Agency (KP Broker ID# 9999) will be merging with 123 Fake Agency, Inc (KP Broker ID #88888). The surviving entity will be ABC Fake Agency operating under Tax ID xx-xxxxxx under license number MD: xxxxxxx, VA: xxxxxxx, DC: xxxxxxx. Please keep KP Broker ID#8888, but they will now operate under the ABC Fake Agency entity. The following agents will remain with ABC Fake Agency under Broker ID#8888. Attached is a copy of the merger agreement. Thank you.

Agent John Smith (please update email address to JohnSmith@abcfakeagency.com)

- Customer ID#123 Fake Company One

Agent Jane Smith

- Please remove access and transfer all business to John Smith

Provide
Supporting
Documentation

Specify Any
Agent Change
Details

Specify Surviving
Entity Details
Business

Sincerely,



Jane Smith
Owner
123 Fake Agency, Inc

Must be signed by both
agencies that are
merging

Authorized Signatory
Field Required

Sincerely,



John Smith
Owner
ABC Fake Agency, Inc