

# Request for Merging TWIA Agent / Agency Book of Business

## Important Information



- You must move the entire book of business. We are not able to move only a portion of the policies.  
Quotes **will not** transfer over, only active policies and pending renewals.
- All information must be shown **exactly** as it is shown on the TWIA database.
- We are not able to backdate the effective date prior to January 1<sup>st</sup> of the current year.
- Only an Officer or Director registered on file with TDI may sign the request to transfer or accept the book of business. The same officer should not sign for both agencies unless they are the sole owner of both agencies.
- Please be sure to include both the printed name along with a respective signature at the bottom of each section and the person's title.

### **\*\*\*IMPORTANT\*\*\***

**Please be sure to discuss potential depopulation policies in the selling agent's book of business as this may impact the merge process.**

#### **Releasing responsibility for the entire book of business:**

This is to notify TWIA that the following agent/agency is selling, transferring, merging, etc. their entire book of windstorm business to the agent/agency listed below as Buyer.

Name of the agent or agency:

TDI Property & Casualty license No.:

Address:

City, state & zip:

Effective date of the transition:

Printed name, signature & title:


#### **Accepting responsibility for the entire book of business:**

This is to notify TWIA that the following agent/agency accepts complete responsibility for all policies previously written through the agent/agency listed above as Seller.

Name of the agent or agency:

TDI Property & Casualty license No.:

Address:

City, state & zip:

Effective date of the transition:

Printed name, signature & title:
