

Changing the Servicing Agent

To change the agent of record on an existing policy, the new agent must obtain a letter from the policyholder. This letter must include:

- o The policy number
- o Words showing request of change to the new agent
- o Full name of the new agent
- o The new agent's respective insurance carrier agent number
- o Policyholder's signature and address

Once the letter is obtained, please fax this letter to Imeriti at [866.592.7974](tel:866.592.7974).

Note: Insurance companies could take about 8 to 12 weeks to change the servicing agent request, depending on the volume of requests. If the agent or client would like to check on the status of the change, he or she should contact respective insurance company's policyholder services department.

***CUSO Financial Services ONLY** – in addition to the letter mentioned above, the credit union program manager must also make the change of agent internally, on Datavision.

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