

## AGENT OF RECORD CHANGE REQUEST

This form is used to transfer both annuity and life policies from one agent to another.

For Life Insurance Policies Only: ☐ Servicing Agent (non-commissionable) ☐ Agent of Record

*Note: If commission end-date has passed, an agent of record change will be processed.*

**Policy  
Information**

Policy/Contract Owner(s)

Policy/Contract number

Last 4 digits of Policy/Contract Owner(s) SSN

**Current Agent/  
Agency of  
Record**

Name of current agency or broker/dealer

Current agent's name

Current agent's 10-digit Symetra Agent ID *(if known)*

For Life Insurance Only *(Not required for servicing agent changes)*:

RELEASE AUTHORIZATION: I release all rights to the above-mentioned policy number(s).

*If policy is still  
commissionable, a  
signature is  
required.*

Printed name of Agency/Principal

Date

Signature of Agency/Principal

SIGN HERE

**New Agent/  
Agency of  
Record**

Name of new agency or broker/dealer

New agent's name

*Requests submitted  
after a prior  
servicing agent  
update has been  
processed will  
supersede any  
prior servicing  
agent request.*

New agent's 10-digit Symetra Agent ID

Last 4 digits of new agent's SSN

New agent's phone number

New agent's e-mail address

For Life Insurance only *(Not required for servicing agent changes)*:

Accepting Firm:

Printed name of Agency/Principal

Date

Signature of Agency/Principal

SIGN HERE

**California  
Fraud  
Warning**

For your protection California law requires the following to appear on this form: Any person who knowingly presents false or fraudulent information to obtain or amend insurance coverage or to make a claim for the payment of a loss is guilty of a crime and may be subject to fines and confinement in state prison.

**Policy Owner  
Signatures**

Policy/Contract Owner's signature

**SIGN HERE** 

Date

Joint Policy/Contract Owner's signature

**SIGN HERE** 

Date

*Fax completed form to Symetra Life Insurance Company at 1-866-305-3253. Please allow up to 10 business days from date of receipt for processing to be completed. For status inquiries, please email [producerchanges@symetra.com](mailto:producerchanges@symetra.com) or call 1-800-210-1106, option 3.*