



**Please select the type of transfer:**

- External Change of Agent (Complete Section I - Requires Client Signature **OR** Releasing/Accepting Signature)
- Internal Change of Agent within Corporation (Complete Section II - Requires Office Manager Signature)
- External Block Transfer (Complete Section III - Requires Client(s) Signature **OR** Releasing/Accepting Signature)
- Internal Block Transfer within Corporation (Complete Section IV - Requires Office Manager Signature)

**Section I - External Change of Agent**

Former Broker Dealer		New Broker Dealer		Contract Number(s)	
Former Agent of Record		New Agent of Record		New Agent Code	
New Agent Address (City, State, ZIP Code)				Social Security Number	
Client Name		Social Security Number	Issue State	Client Signature	
Releasing B/D Signature			Accepting B/D Signature		
Split Agents			Percent		

**Section II - Internal Change of Agent**

Former Agent of Record		New Agent of Record		New Agent Code	
Address (City, State, ZIP Code)				Social Security Number	
Client Name		Social Security Number	Issue State	Office Manager Signature	
Contract Number(s)					
Split Agents			Percent		

**Section III - External Block Transfer**

Former Broker Dealer		New Broker Dealer		Former Agent Active?*	
Former Agent of Record		New Agent of Record		New Agent Code	
Address (City, State, ZIP Code)				Social Security Number	
Releasing B/D Signature		Confirm**	Accepting B/D Signature		

**Section IV - Internal Block Transfer**

Former Agent of Record		New Agent of Record		New Agent Code	
Address (City, State, ZIP Code)				Social Security Number	
Manager Signature		Confirm**	Former Agent Active?*		

\* For Former Agent Active block; if former agent is no longer with company please add "TERM" in block, leave blank if agent is active.

\*\* For agent Confirm block, Select YES or NO for Confirmation, if Yes fill out second form.

Return Form(s) for Processing to:

**Nassau Re**  
**Distribution Relationship Service**  
**PO Box 19052**  
**Greenville, SC 29602-9052**  
**Phone: 1-800-426-1005**  
**Fax To: 1-800-483-7992**



**NASSAU RE**

Nassau Life and Annuity Company  
Nassau Life Insurance Company  
PHL Variable Insurance Company

### Block Transfer Confirmation

- Please Fax Results after processing
- Please Call Agency after processing
- No Response is Necessary

Agency Phone Number	Agency Fax Number	Attention
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For HOME OFFICE use ONLY

Date	Processed By		Status
Policy(s) Moved	Date Moved	Comments	