



## Agent/Agency Release Policy

**Purpose:** Outline the process for agents and agencies to request release from current upline and subsequent move to new upline.

**Process:**

- Agent/Agency will submit a request for release to current upline agency and [agentdesk@atriohp.com](mailto:agentdesk@atriohp.com)
  - Request for release should include agent/agency name, NPN, current upline and proposed upline.
  - Upline agency has the option accept the request and immediately release or to hold for 3 months. After 3 months the release will be granted by ATRIO.
  - Upline agency will send approved or denied request response back to ATRIO broker support [agentdesk@atriohp.com](mailto:agentdesk@atriohp.com)
  - If ATRIO does not receive a response from the upline agency within 14 days, the release will be granted by ATRIO.
- If immediate release is not granted by upline agency, the agent can continue to write business under their original upline as long as they remain certified to sell ATRIO products.
- Upon approval by ATRIO, the agent/agency transfer will be completed within 3 business days.

**AEP Blackout Period:** No agent transfers or releases will be permitted between 10/1-12/31. Agents who's 3 month waiting period falls during the blackout period will be transferred under the new upline on 1/1.