

SME E-trade Agency Transfer Process

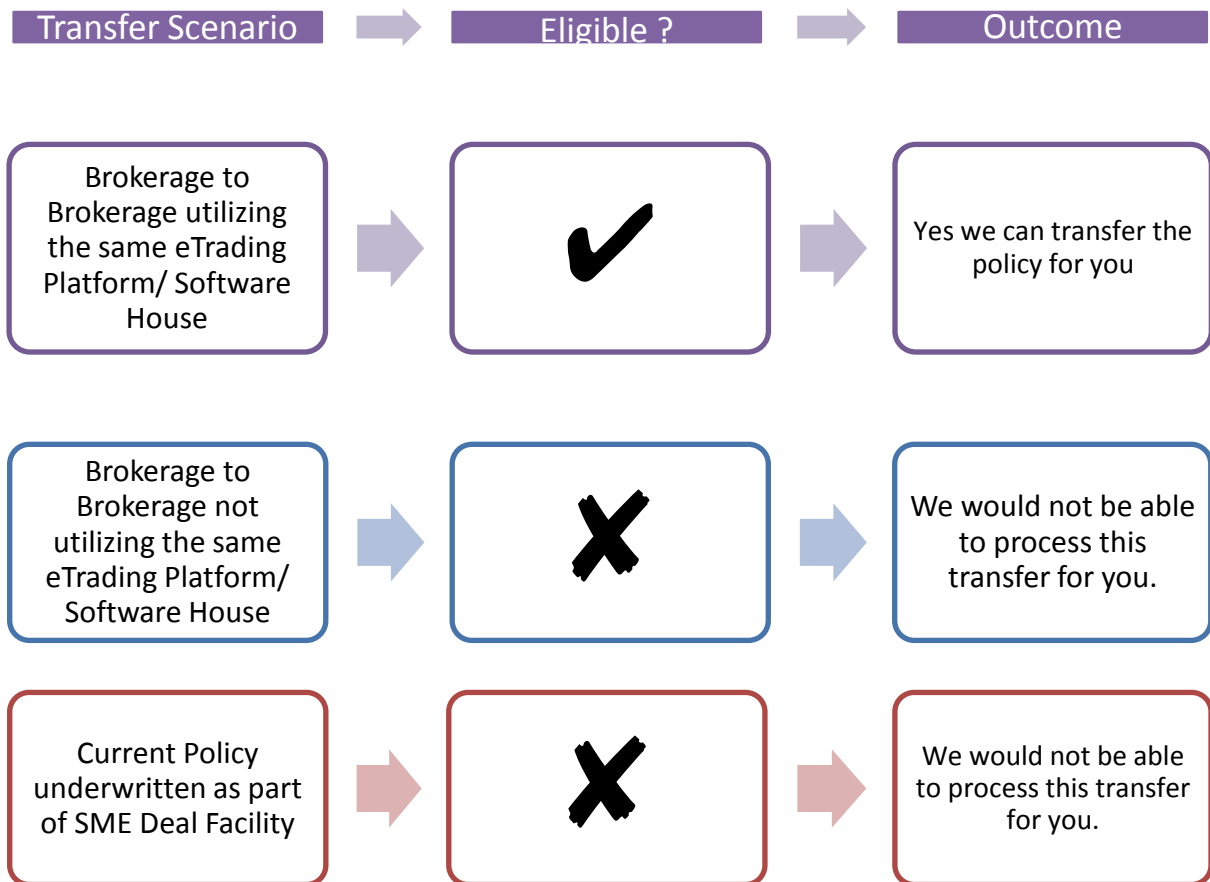
When you are looking to have an Agency Transfer processed on a SME E-Traded policy you need to make sure that it is eligible to be transferred and what information you need to send in to us to have this completed. This page is to help you do just that.

Can we transfer your client's policy?

Below is a list of scenarios of whether RSA can process a transfer on your client's policy. You will need to be aware of what ETrading Platform/Software house the policy currently sits on and what ETrading Platform/Software house your Brokerage currently trades on.

Important Information:-

- **For EDI policies**, if the transfer is eligible, it will become a non E-Traded policy serviced by your SME operations team until the next renewal date where we will require you to re-broke the policy on to your own ETrading Platform/Software House.
- **For Non Edi E-trade policies** - If the Policy is an Acturis Policy or moving to an Acturis Platform we will not be able to process an Agency Transfer and you will need to re-broke as New Business.
- **SME I-Market policies** are also non transferrable you will need to re-broke as New Business.
- **Outstanding Debt** -If the current policy has any money outstanding on the RSA account we will not be able to transfer until payment is received from the holding broker.





Next step ?

If the transfer is eligible we would require you to fill out the Agency Transfer Request Form and submit this to Glasagency.transfer@uk.rsagroup.com along with the Letter of Appointment.

If the transfer is not eligible you will need to re-broke the policy as New Business on your own ETrading Platform/Software House. The insured will have to cancel the policy with the holding broker and request policy documents.