

## Request for Change of Servicing Representative

---

### Policyholder Request to Change Policy Servicing Representative

---

This section is to be authorized by the Policyholder/Owner and submitted to the New Representative.

I, \_\_\_\_\_ request that \_\_\_\_\_  
Policyholder (Owner) New Representative

replace my current servicing representative for the following policy(ies) with ivari.

Policy(ies): \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

By signing this form, you authorize ivari to change information on your policy(ies) as indicated above.

\_\_\_\_\_  
Policyholder's (Owner) Signature Date (DD/MM/YYYY)

\_\_\_\_\_  
Policyholder's (Owner) Signature Date (DD/MM/YYYY)

---

### Representative Authorization

---

This section is to be completed by the New Representative and submitted to the Distributor Office or Dealer and forwarded to ivari's Head Office. Investment Product business will be transferred for both servicing, future commissions and overrides effective the date this request is received at Head Office.

\_\_\_\_\_  
New Representative Name New Representative/Advisor Code

\_\_\_\_\_  
New Representative Signature New Distributor Office/Dealer Code

Please read **ivari's Privacy Policy** at [ivari.ca](http://ivari.ca) to understand how ivari handles your personal information. We may update this Privacy Policy from time to time.



**The fastest and easiest way to send us your completed and signed forms is through our online tool, *Send documents* on [ivari.ca](http://ivari.ca). By using this tool, forms are sent instantly and securely.**