

Broker of Record Change – Fact Sheet



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Carrier	E-Sign OK?	Generic Template Accepted?	Carrier-Specific Form Available?	Notes
 Ameritas	Yes	Yes	Yes	BOR change request triggers a 15-day retention period
 Assurity	No	No	Yes (required)	Will not appoint for BOR changes only
 IDU	Yes	Yes	Yes	
 ILLINOIS MUTUAL®	Yes	Yes	No	BOR change request triggers a 10-day retention period
 MassMutual	No	Yes	Yes	
 MetLife	Yes	Yes	Yes	
 Mutual of Omaha	Yes	Yes	No	Will not appoint for BOR changes only
 Lion	Yes	Yes	No	Must note requested effective date of BOR change
 Principal®	Yes	Yes	Yes	
 The Standard®	Yes	Yes	Yes	