Client Transfer Rules



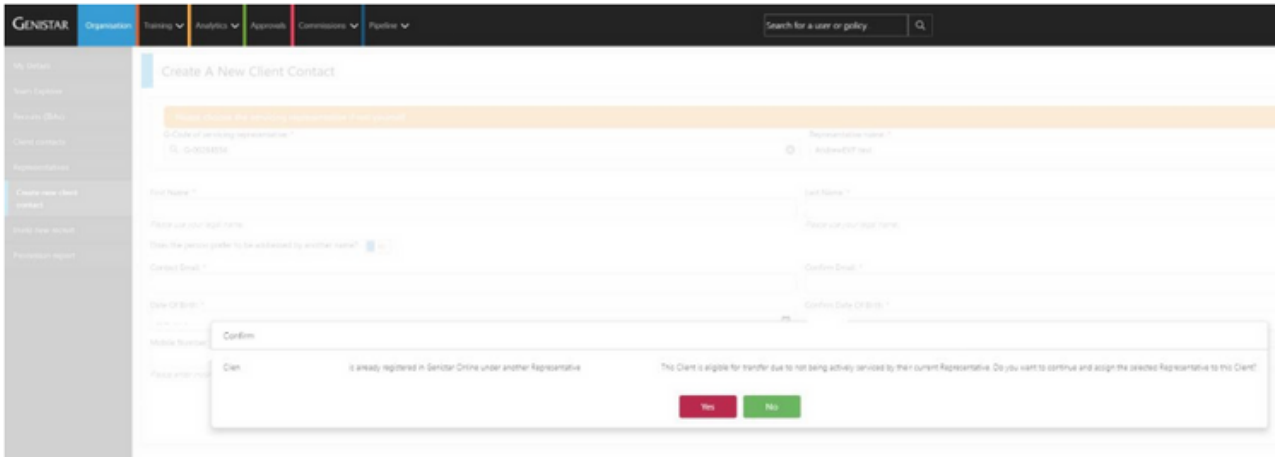
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1) Clients will be released if Fact Find has never been submitted and;

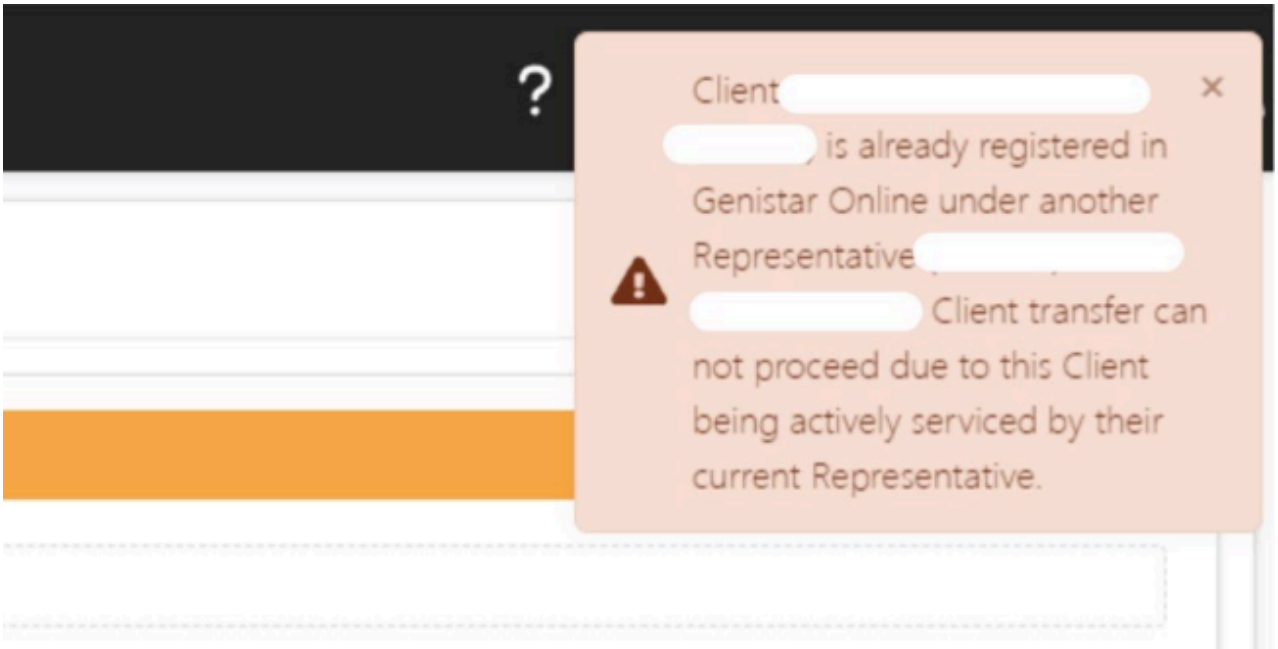
- Their client review remains unmodified for 30 days+.
- Service rep hasn't been changed in last 30 days.

Un-serviced contacts created before September 2019 are no longer able to be transferred to a different servicing representative.

2) Client's full name, D.O.B, email address and phone number must match the exiting detail in the system for the transfer question to be triggered. (Please see the screenshot attached).



3) Please note, above error message will appear if the client is NOT available for transfer. (Please see the screenshot attached)



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