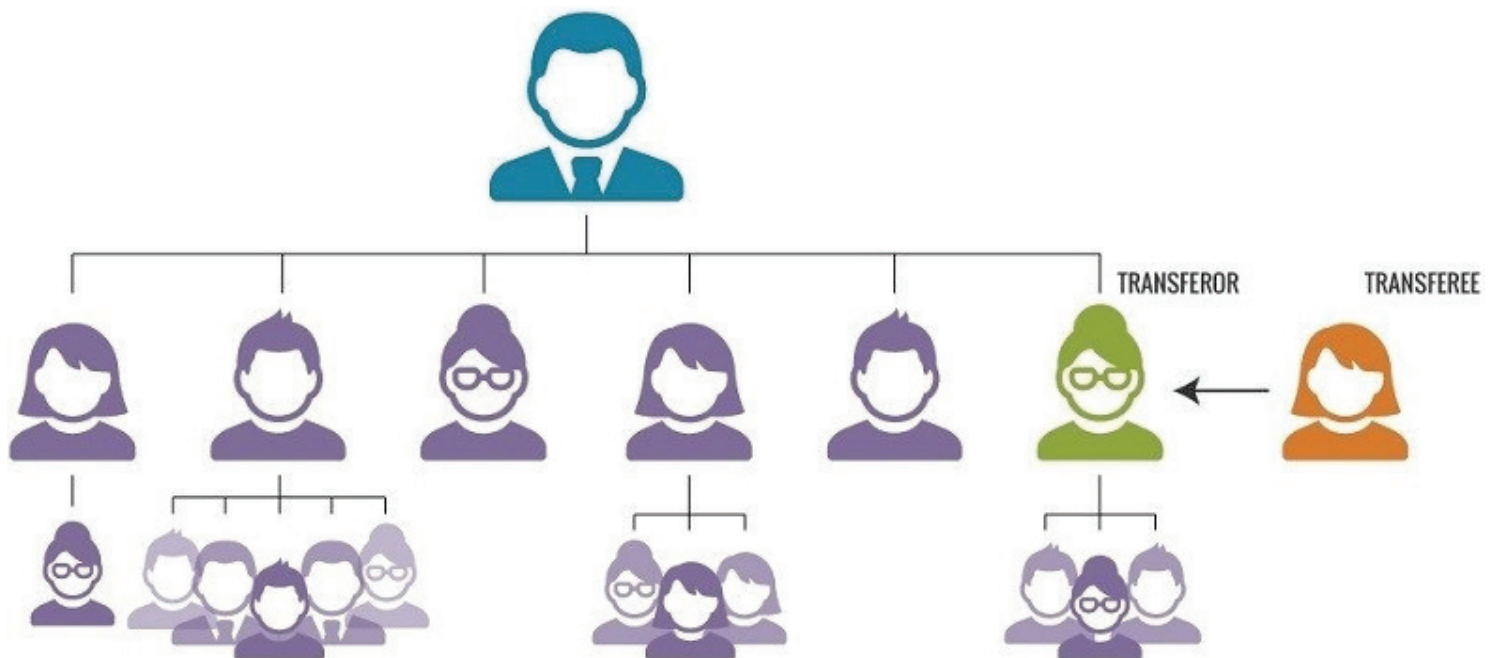


Helpful tips for your next Account Transfer

An Account Transfer allows a new Wellness Advocate to take over the position of an existing Wellness Advocate. In this process, the person giving up their position has the option to remain in their current placement as a Wholesale Customer, or to Terminate their account.



Requesting a transfer

Step 1

Enroll/Upgrade/Reactivate the Transferee as a Wellness Advocate
(Must have **same Enroller and Sponsor** as the Transferor)

Step 2

Submit an Account Transfer Form on the Back Office **OR** by sending a digital copy of the form to **placements@doterra.com**

(Signatures must be pen-to-paper, or obtained through DocuSign.com with a DocuSign Certificate of Completion included.)

Both methods require the **Transferor to submit** the Account Transfer Form within **14 days** of the transferee's enrollment or upgrade.

(Account Transfers submitted between the 1st-15th of the month will be processed after the 16th.)

Account Transfer

What Transfers?



Does Transfer

Rank
.....

Team
.....

**Enrollment
Change History**
.....

**Ability to Place
LRP Order**



Does Not Transfer

**Wellness
Advocate Number**
.....

Reward Points
.....

LRP %
.....

AR Balance
.....

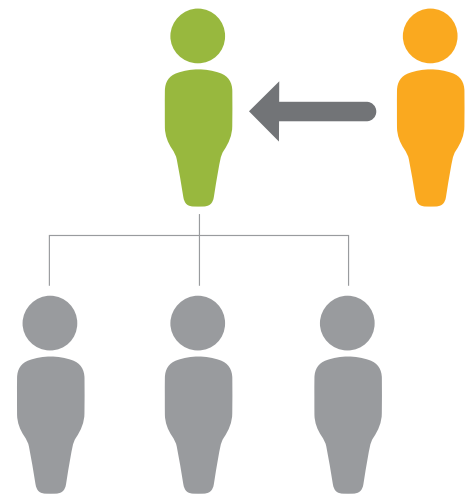
**Personal Volume
(orders)**

Transferor

Member
transferring
out of their
position

Transferee

Member
transferring
into a
position



All account transfer paperwork must be submitted **within 14 days** of the Transferee's **enrollment or upgrade** to a Wellness Advocate.

Types of Account Transfers

Newly Enrolled Wellness Advocate

Must have same enroller and sponsor, online submission **OR** Digital Account Transfer Form available.
(Takes 1-3 business days to process.)

Upgraded Wholesale Customer

Must have same enroller and sponsor **and** Digital Account Transfer Form available.
(Takes 1-3 business days to process.)

Inactive Wellness Advocate

Must have same enroller and sponsor **and** Digital Account Transfer Form available. Extra time needed for compliance review.
(Takes 7-10 business days to process.)

Note that all required signatures must be pen-to-paper, or obtained through DocuSign.com with a DocuSign Certificate of Completion included.



For more detailed information on how to request an account transfer, scan here:
OR visit help.doterra.com
Account Information --> Placements --> Account Transfers