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.)
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)

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