

Getting Started **Checklist**

Your Next Steps as a Licensed Agent













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The Checklist

Our platform helps independent life licensed agents from all backgrounds build and grow successful businesses, which allows them to help people have better financial futures. As you get started as a licensed agent, use this checklist to help start you on your path to success.

-  Explore MyWFG.com
-  Sign up for the Platform Fee and E&O Insurance
-  Set up Direct Deposit
-  Get appointed with a provider
-  Learn about WFGIA product offerings
-  Access and complete the New Agent Course on the Training Center
-  Obtain company-created and compliance-approved marketing material
-  Create your personal website
-  Follow us on social media and read the WFG Weekly
-  Know your key contacts

WFG has
agreements with
many well-known
companies in the
financial services
industry.



Explore MyWFG.com

[MyWFG.com](#), our internal agent site, is the centralized hub that brings the WFG platform together. Not only is it how you access resources such as the [Agent Websites](#) and the [Training Center](#), it is also where you request carrier appointments, obtain commissions information, run reports about your business, and learn about important company-related updates and news.

MyWFG is an essential tool as you grow your business. We recommend you familiarize yourself with the site and take a look at some of the most visited sections, such as the [Reports area](#) where you can track your and your team's production and licenses as well as the [Back Office Support System \(BOSS\)](#) where you can find WFG forms. Add your favorite MyWFG pages to the toolbox by clicking on the + icon located on the top right side of the page so they are never more than a click away.

Take a tour of MyWFG in the course available on the [Training Center](#) to learn the tools available to you as a licensed agent.



Sign Up for the Platform Fee and E&O Insurance

Because of WFG's scale and expertise, we can offer our licensed agents a full suite of premier technology at a low monthly cost. [The Platform Fee](#) is \$15 per month for life licensed-only agents and payment is required. Please sign up for recurring payments via [Payment Central](#) on MyWFG.

E&O insurance coverage is required by WFGIA as well as our providers, and you must have it in place when you become appointed with a provider. New York licensed agents are required by state regulation to provide their own E&O insurance. For all other states, Marsh is WFGIA's broker for this coverage and you can sign up via the [Marsh Agent E&O Insurance Portal](#). Premiums vary based on your license type, please check the [E&O page on MyWFG](#) for full details. Should you have questions about the registration process, you can contact the Marsh Account Management Team at 1.800.380.0451 or via email at EandOServices@marsh.com.

Please note that you must sign up for to pay the Platform Fee and obtain your E&O insurance within your first 30 days as a licensed WFGIA agent.

Setup Direct Deposit

Get your commissions quickly and conveniently paid by completing and submitting the Direct Deposit Authorization Form available on MyWFG's [Back Office Support System \(BOSS\)](#).

Get Appointed with a Provider

WFGIA has agreements with many well-known companies in the financial services industry. To start helping people in your community and earning an income, it's essential that you first become appointed with one or more product providers. Begin the process on the MyWFG [Carrier Appointment](#) page by selecting the product line you wish to offer.

Learn About WFG Product Offerings

The [WFG Product Guide](#), available on MyWFG, is updated with the latest commission information for all the products our providers offer.

For additional product information and resources to help with case design, please check [Transamerica's Agent Home](#), the [AMS website](#) or [Crump's co-branded site](#). Transamerica's Agent Home provides access to your sales tools, training, and books of business on one page. AMS provides support for fixed and fixed indexed annuity sales. Through Crump's site you can access Vital Quote to compare life insurance rates, an Underwriting Resource library and more.





Access the New Agent Course on the Training Center

The New Agent Course is a series of modules that cover a variety of topics, including the fundamentals of selling as well as an overview of the technology and resources available to you.

The modules can be completed in one sitting or in multiple sessions, depending on your schedule. You can access this [training course](#) through the Training Center.



Order Official WFG Merchandise

The WFG Store is the best place to obtain copies of all our pre-approved WFG brochures and presentations. It's also your go-to resource for purchasing business cards. From the toolbox icon on MyWFG, select the "WFG Store" button to start browsing.



Create Your Personal Website

As a WFGIA licensed agent, you can create your own personalized agent website with a profile picture, contact information and personal URL. To get started, login to MyWFG and navigate to the [Agent Website page](#).

Once there, you will need to opt in to have the website and then you can customize the site with your contact information and desired lead magnets. It will then be sent to Compliance for review.

Follow Us on Social Media and Read the WFG Weekly

Every Monday, all licensed agents receive the WFG Weekly, our newsletter that includes important announcements, news and information about upcoming events, contests and webinars. To ensure timely delivery, please make sure to add wfgmarketingdepartment@transamerica.com to your preferred sender's list.

We also encourage you to follow us on all our social media channels for a behind-the-scenes look at company events, home office updates, videos, agent recognition and more. Our social media handles are:



Know Your Key Contacts

When you have questions you can check the Help & Support section of MyWFG for answers. Select the "Help" button located in the footer on each page of the website to access Knowledge Articles that answer the most common agent questions. If you're not able to find the information you're looking for, you can submit a support ticket for further assistance or you can contact BDT at the number listed below.

Make sure to keep a record of these important numbers.

Business Development Team (BDT)
877-368-4100

SMD Upline:

Your Direct Upline:

[Full WFG Directory](#)

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WFGUS10067R10/5.25

