

CONTACT SHEET

INDEPENDENT AGENCIES

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TRANSAMERICA®



INTRO, TIPS, & TRICKS

Working with multiple carriers and managing all your contacts can get complicated.

That's why we've prepared an easy-to-navigate contact sheet for our valued agents and firms. All of your common contacts are now within arm's reach to help you sell, place, and manage business.

QUICK START GUIDE

We process business on a first-in, first-out basis. This means we always work business in the order it's received. Should a mistake be identified, internal Transamerica support is able to request expedited processing to address the issue.

The standard processing time for email requests is 24–48 hours. Specific processing for various departments is detailed in this packet to provide a realistic timeframe. Escalations should be directed to your internal contact if these timeframes have not been met, however, you should first check the portal as the most up-to-date information on specific cases will always be posted there.

When reaching out to our teams, please first use the regular processing email box for the team you need to contact. If you don't get resolution from that email, then use the escalation email box (if applicable). If not, please reach out to your internal contact to escalate on your behalf.

Please do not use or share individual contact email addresses (Account Managers or Sales Partners being the exceptions). Since these individuals work primarily in their department's email box, they may not always check their personal inboxes regularly. This can cause further delays when you're trying to get help.

For escalations, please send the full email chain to your Transamerica partner so they can review what has been done, to determine the next best steps to resolve the issue the most efficient way.

The most efficient way to resolve issues is to keep one line of communication. Emailing several contacts about the same issue (without others knowing) can cause unnecessary delays. If another contact is brought in, please copy (CC:) previous individuals or teams.

Our contacts are here to help in any way they can, but we're all human. Should one of our processors ever provide incorrect information, they will be coached to ensure that information is not shared again. Keep in mind, Transamerica will not always be able to honor answers given in error.

MASTER LIFE CONTACTS

WEB PORTALS		
agentnetinfo.com		
secure.transamerica.com		
IMPORTANT PHONE NUMBERS		
Toll-Free Number to Call	877-234-4848	
Underwriting & New Business Questions - Life, Final Expense	Option #1	
Commissions	Option #2	
Contract & Licensing	Option #3	
Policyholder Customer Service/Claims	Option #4	
Sales Desk/Product Support	866-545-9058	
iGO e-App support prior to case submission	866-303-7833	
Sales Office Technical Support (SOTS)	866-303-7833	
Technical Support at iPipeline®	800-641-6557	
AUTHORIZED PARAMED COMPANIES		
APPS-Portamedic	800-727-2101	appslive.com
Insurance Medical Services, Inc.	877-808-5533	imsparamed.com
Exam One Inc.	800-768-2056	examone.com
ExamOne Superior Solutions	800-898-3926	smminsurace.com
Client Lab Results	https://transamerica.accessmyhealth.com/	
IMPORTANT FAX NUMBERS		
New Business/Reissues	866-297-3607	
Conversions/Rewrites - Life Only	800-238-4302	
In Force Customer Service	866-622-5051	
Contract & Licensing	888-837-2820	
DIVISION PHONE NUMBERS		
Annuities (General Customer Service)	800-797-2643	
Mutual Funds	888-233-4339	
Employee Benefits	866-411-4159	
Retirement	800-211-8491	
MAILING ADDRESS		
Billing, Mail Premium, & Overnight Requirements	6400 C Street SW Cedar Rapids, IA 52499	

MASTER LIFE CONTACTS CONTINUED

IMPORTANT EMAIL ADDRESSES	
Life Sales Desk	lifesales@transamerica.com
iGO e-App® Tech Support (Prior to app submission to Trans)	igosupport@ipipeline.com
New Business – Term, IUL	life.marketsnewbusiness@transamerica.com
New Business – Final Expense & <i>Transamerica Lifetime</i> ®	finalexpensenewbus@transamerica.com
Attachments Only – In Force for 8-digit policy numbers starting with 0, 4, and 9; 9-digit policies starting with 6600. *Body of email will NOT be read-include policy number in subject line.	interimcsforward@transamerica.com
Attachments Only – In Force for 9-digit policy numbers starting with 011, 012, 013, 014, 015, 016, 8, LFC, FEX, etc. *Body of email will NOT be read - include policy number in subject line.	afpcrcustomerservice@aegonusa.com
New Business – Escalations Emails received prior to 3 p.m. CST will get same day response.	TANBEscalations@transamerica.com
International Underwriting Quick Quotes	international@transamerica.com
Contract & Licensing - Life	tlp-crcontractadmin@transamerica.com
Commissions	commissions@transamerica.com
In Force Customer Service Inquiries	tii.customerservice@transamerica.com
In Force Customer Service Inquiries for Policies Starting with "60"–"65"	Life.CustomerService@transamerica.com
In Force Policy Change Inquiries and Reissues for Life Insurance Policies	tii.customerservice@transamerica.com
Duplicate policies and complex post-issue corrections, research, and inquiries	afpcrtranscomcorr@transamerica.com
Conversions to IUL & Internal Replacements - For initial questions about eligibility or to run illustrations please contact the Sales Desk	Eligibility: tii.customerservice@transamerica.com Processing: conversionsandinternals@transamerica.com
Conversions to Whole Life & Internal Replacements - For initial questions about eligibility or to run illustrations please contact the Sales Desk	Eligibility: tii.customerservice@transamerica.com Processing: conversionsandinternals@transamerica.com
Claims	bkgclaimsstatus@transamerica.com
Claims for Policies Starting with "60"–"65"	lifeproclaims@transamerica.com
Customer Service – Policy loan, surrender, withdrawal, free look, and 1035 exchanges	afpcrtranspoloansurr@transamerica.com
Agent Portal Technical Support and Sales Office Technical Support (SOTS)	Salesoffice-support@transamerica.com
iPipeline Technical Support (iGO)	igosupport@ipipeline.com
Underwriting Support - Used for APS fee approval, requesting copies of labs and exams, getting information to an UW working a case	professionalrelations@transamerica.com

WHO TO CALL, SLAs

DEPARTMENT/REASON TO CONTACT		SLA TIME
<p>Premium</p> <ul style="list-style-type: none"> • Premium Collections (In Force Policies) • Billing/Billing Issues • Timing of Premium Payments for Conversions • Applying Money to Premiums • Group Payroll • Salary Deduction • Waiver of Premium 	<ul style="list-style-type: none"> • CSFL Individual Billing Queues Billing & SSBO • Speedpay • Overdrafts • TEFRA/TAMRA • Banking & Credit Card Updates • Shortages & Grace Period • Returns - Checks, PAC, Credit Card • Payments - Lockbox, Checks, Wires 	<p>24-hour (automated response) 3 business days ETA for critical requests Same day for VUL policies 5 business days ETA for standard work</p>
In Force Policy Illustrations		<p>5 days for general inquiries 2 days for escalations@ipeline.com</p>
<p>Commissions</p> <ul style="list-style-type: none"> • General Questions, Billing, Billing Issues • Change of Servicing Agent • Off Cycle • Commission Requests • Statements • History • Chargeback Rules • Advances 		<p>5 business days for general inquiries 2 business days for escalations</p>
<p>Sales Desk</p> <ul style="list-style-type: none"> • Conversions • Illustrations • Quotes • Product • Questions • Riders and Benefits • Questions 		<p>24-48 hours for response time. Please request specific processing SLA time from your contact.</p>

WHO TO CALL, SLAs CONTINUED

DEPARTMENT/REASON TO CONTACT	SLA TIME
<p>Contracting & Licensing</p> <ul style="list-style-type: none"> Contract Paperwork Termination Status Contract Status Contract Paperwork Transfer Book of Business Lack of Production Agent Holds View Information GA Mass Transfer From One IMO to Another 	<p>Appt requests: 2-3 business days Contact info update: 5-6 business days Direct deposit update: 5-6 business days General inquiries: 5-6 business days Termination requests: 30-31 business days Agent change on in force policy: 2-3 business days</p>
<p>Contact Center</p> <ul style="list-style-type: none"> Non-Escalation Issues Banking Information In Force Questions General Maintenance Beneficiary Questions Premium Collections - In Force Policies All Billing and Premium Collections Billing Issues Timing of Premium Payments for Conversions Applying Money to Premiums Conversion Questions 	<p>Policy changes/updates, illustration, NTO requests, ownership changes, POA/guardianships, reinstatement (no UW), reissue (no UW), release of assignment, rewrite (no UW), surrender, third-party authorization, withdrawals: 3-5 business days; 1035 exchanges, correspondence/histories: 5-7 business days Duplicate policies, general research: 5-10 business days Premium research: 7-10 business days Custom illustrations: 10-15 business days Policy change, reinstatement, reissue, rewrite (all with UW): 30-60 business days</p>
<p>Traditional New Business</p> <ul style="list-style-type: none"> Policy Questions Application Requirements Policy Errors Reissue Requests General Underwriting Questions Status of Submitted Work 	<p>24-48 hours for response. Please request specific processing SLA time from your contact.</p>
<p>SOTS</p> <ul style="list-style-type: none"> Set Up GA/Producers GA Access General GA Tech Support Manages Global Address Book User Requests/TransAct Logins Main Account Creation 	<p>Emails: 24-48 hours Phone calls: Same day for response</p>

WHO TO CALL, SLAs CONTINUED

DEPARTMENT/REASON TO CONTACT	SLA TIME
<p>LifePro</p> <ul style="list-style-type: none"> • Illustration Issues • Life Pro Conversions • Owner and Beneficiary Changes • Custom Illustrations 	<p>Surrender requests, cancels, not takers, complaints, conversions, loans, withdrawals, NFO, tax requests: 10-15 business days</p> <p>Reinstatement requests, reissues, rewrites, complex research, complex correspondence, any work requiring UW, 1035 exchanges: 15-30 business days</p> <p>Billing/PAC changes, approved rush requests: 3-5 business days</p> <p>Beneficiary and ownership changes, loan histories, premium histories, duplicate policies, ownership changes, beneficiary changes, name change, SSN updates, deceased ownership change, collateral assignment, release of assignment, POA/guardianship, third-party authorization, stop pays, bank statement review, address changes, entity and trust updates: 7-10 business days</p> <p>Illustration requests: 20-30 business days</p>
<p>Underwriting</p> <ul style="list-style-type: none"> • Reason for Decline • Consider Better Offer • Foreign Nationals (email inbox) 	<p>2 days for everything - initial reviews and WIP (mail) items</p>
<p>Corrective Processing</p> <ul style="list-style-type: none"> • In Force Policy Changes and Reissues for Life Policies 	<p>24-48 hours for response. Please request specific processing SLA time from your contact.</p>
<p>Policy Reinstatements</p>	<p>24-48 hours for response. Please request specific processing SLA time from your contact.</p>
<p>Complex Corrections</p> <ul style="list-style-type: none"> • Duplicate Policies • Post-Issue Research and Inquiries 	<p>24-48 hours for response. Please request specific processing SLA time from your contact.</p>

WHO TO CALL, SLAs CONTINUED

DEPARTMENT/REASON TO CONTACT		SLA TIME
<p>Policy Loan and Surrender</p> <ul style="list-style-type: none"> Loans Tax Consequences/1099 Tax Statements Withdrawals/Partial Surrenders Dividends Cancellations/Not Takens/Freelooks VUL Disbursements Surrenders Cost Basis & Form 712 External 1035s 	<ul style="list-style-type: none"> Stop Pays Overloans Maturities Restore General Inquiries Unclaimed Property One-Year Term Insurance Life Admin. Disbursements Dormants Medicare Supplement Disbursements External 1035s 	<p>24-48 hours for response. Please request specific processing SLA time from your contact.</p>
<p>Beneficiary Title</p> <ul style="list-style-type: none"> SSN and Name Changes Deceased Owners Beneficiary Changes POA/Trusts/Entities Owner & Payor Changes Legal Miscellaneous 	<ul style="list-style-type: none"> Assignments and Releases Third-Party Authorizations Bankruptcy Special Authorizations Address Changes Corporate Resolutions 	<p>24-48 hours for response. Please request specific processing SLA time from your contact.</p>