

TERM POLICY

PDFS ON TRANSACT®

SUMMARY

Beginning April 28, 2022, agents and firm contacts will be able to view and download new term policy PDFs on TransACT®. Term policy PDFs will be available for cases mailed or eDelivered on or after April 27, 2022.

The term policy view and download feature gives agents:

- **IMPROVED VISIBILITY:** Access to issued term policies and delivery requirements in real-time.
- **FASTER CLIENT COVERAGE:** Communicate with clients about any delivery requirements to help speed up policy placement.
- **SUPERIOR CUSTOMER SERVICE:** Proactively notify and set client expectations before the client receives the policy.
- **BETTER RECORD RETENTION:** Save digital copies of term policies to manage in force business efficiently.

Q1. When can I view a policy PDF for term policies?

A. You can access policy PDFs on TransACT® beginning April 28, 2022, for policies issued and mailed on or after April 27, 2022.

Q2. Where can I find the term policy PDFs on TransACT®?

A. In the Delivery Requirements section. Once a term policy has been issued and mailed, a PDF icon will display next to the Requirement labeled Policy Document. Clicking on the Policy Document PDF icon will open the term policy PDF.

Q3. Can I view and download the policy PDF for a term policy that has been issued but not mailed?

A. No. The policy must be issued and mailed to view and download the policy PDF. You can see the Issued Date and Mailed Date fields in the Basic Information section.

Q4. Can I access term policy PDFs for policies with delivery requirements?

A. Yes. PDFs of the policy contract and delivery requirements can be viewed and downloaded for policies with or without outstanding delivery requirements.

Q5. Can I view and download term documents other than the term policy contract PDF documents?

A. The new term policy PDF feature provides the ability to view and download newly issued term policy contracts and delivery requirement PDFs only, and does not replace or alter existing features or tools that may be available for other document types.

Q6. Will policy owners still receive their contract by mail or eDelivery when policy documents are viewable on TransACT®?

A. Yes. The view and download feature does not replace the policy contract mailing or eDelivery process.

Q7. Can I get PDFs of policies issued before April 27, 2022?

A. No. Only term policies mailed or eDelivered on or after April 27, 2022, will have a term policy PDF available on TransACT®.

Q8. Will policy PDFs be made available on TransACT® for reissued term policies?

A. Policy PDFs for pending reissues (before in force policy placement) will be available. Policy PDFs for in force reissues (after in force policy placement) will not be available.

Q9. How long can I view and download term policy PDFs on TransACT®?

A. Term policy PDF documents will remain available on TransACT® for 90 days from the Issued Date.

Q10. Can I view and download term policy PDFs on agent portals other than TransACT®?

A. Not at this time. The view and download feature is currently only available for term policy PDFs on TransACT®.

Q11. Can I view and download policy PDFs for other products?

A. Not at this time. The view and download feature is currently only available for term policy PDFs on TransACT®.

Q12. Will I be able to view and download IUL policy PDFs in the future? If so, when?

A. We are working to make the view and download feature available for the *Transamerica Financial Foundation IUL*® (FFIUL) on TransACT® as quickly as possible. We'll let you know once we have a release date.

Q13. Who can access term policy PDFs on TransACT®?

A. Producers can view and download newly issued term policies on TransACT® that they have written and that were mailed or eDelivered on or after April 27, 2022. General Agencies and Senior Marketing Directors can view and download newly issued term policies on TransACT® that were mailed or eDelivered on or after April 27, 2022, for their downline.

Q14. How do I access TransACT®?

A. For TransACT® portal access, please reach out to Agent Technical Support at 1-800-742-7005.

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