

Introducing *Transamerica My Life Access*SM

Confidence Meets Control



Service made simple with our new customer portal

Made for the client in mind, *Transamerica My Life Access* makes staying up to date on their policy a breeze with easy, 24/7 access to policy benefits, values, transaction history, and correspondence. Clients can register at secure2.transamerica.com to enjoy the benefits below.

Quickly access and review in force policy coverage, benefits, and agent info

- Policy dashboard displays all in force policies and related tax documents (if applicable)
- Product and coverage details
- Insured and owner contact information
- Primary and contingent beneficiaries and allocation percentages
- Issue details, including dates, amounts, risk class, etc.
- Transaction history
- Premium payment details, including billing type, frequency, and due date
- Riders and supplemental benefits
- Index account allocations and policy value (IULs only)
- Agent contact information
- For all in force products, including IUL, Trendsetter, Final Expense, and Lifetime (excludes 0001, Lifepro, and Lifecom)

Digital correspondence makes life easier

- All communications organized all in one place – goodbye complicated paperwork
- Informative policy updates
- Easily access and download policy packet for all financial and estate planning needs
- Paperless correspondence helps protect loved ones – and our environment

Ability to self-initiate, submit, and monitor policy service requests

- Clients can initiate many service requests, such as beneficiary changes, address updates, payment updates, and loan requests, if applicable, anytime and anywhere
- Simply complete the form, submit it to Transamerica using the document upload feature, and track its status to completion
- It's service made simple – for you and your clients

For Agent Use Only. Not for Use With the Public.

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