

YOUR SINGLE SIGN-ON EXPERIENCE

HOW TO GET STARTED

Your time is valuable, which is why we're providing a faster sign-on experience for all your Transamerica business needs.



WHY AGENT HOME?

- Single username and password, straightforward registration
- Automatic updates with the latest tools and information
- Assign delegates to keep your business running smoothly

To activate your new single sign-on experience, follow the steps below. The instructions will differ slightly if you aren't already registered with the Agent + Advisor Portal, but the process is just as simple.



WHAT YOU'LL NEED

- Your agent or advisor number
- Access to the email associated with your current Transamerica account
- Your computer or mobile device — tablets and phones welcome!
- For the best experience, use Chrome, Firefox, or Safari



ABOUT YOUR AGENT NUMBER

- Your advisor number is the same as your agent ID.
- Your agent number or agent ID will have between seven to 10 characters. Ensure you enter the complete number when registering. Some agent IDs will begin with a zero. Please be sure to use the number key instead of the letter "O."
- If you are unsure of your advisor or agent ID number, please contact **800-256-7971 option 1**.



I'M ALREADY REGISTERED FOR THE AGENT + ADVISOR PORTAL

1. Visit secure.transamerica.com/
2. Using the same username and password you use for the Agent + Advisor Portal, log in to your agent portal. This will take you to a new page, "Agent Home," with all the portals and tools you have access to.
3. Once you click the link for any of your tools or portals, you're done!

I'M NOT REGISTERED FOR THE AGENT + ADVISOR PORTAL

1. Click [here](#) to enroll now
2. Ensure that **Financial Professional** is selected. Enter your name and agent or advisor number (enter the full number in all caps, with leading zeros, if applicable.) Complete the captcha.
3. Click **NEXT**
4. Follow these four steps to create your secure account:
 - Create a username and password. Use a primary email address that you currently have access to.
 - Validate your email. You will then receive a security code in your inbox. Enter it on this page.

Security code

8888 -
 - Answer three security questions. You may enter an alternate email address on this page, but please note the alternate email address will be used for all security validation codes and account alerts.
 - Agree to terms and conditions and then click **DONE**
5. You'll then be returned to secure.transamerica.com and can log in using the username and password you just created. This will take you to the Agent Home page with all your portals and tools.
6. Once you click any of the portal tiles, you're done!
7. Once you launch a portal from the Agent Home page, you can only access those portals from the Agent Home page in the future.

Quick Tip: Update your bookmarks to the Agent Home page

Website Technical Support: Monday through Friday, 8:30 a.m. – 7:30 p.m. ET

 **Call:** 866-301-2473

 **Email:** tantechsolutions@transamerica.com

