

TRANSAMERICA LIFE ILLUSTRATOR TOOL

FOR TRENDSETTER AGENT FAQ

Transamerica Life Illustrator is now available to run quotes for our *Trendsetter® Super Series* and *Trendsetter® LB* (Trendsetter) Term products. With this tool, you can look forward to redesigned living benefit supplemental illustrations for our term and IUL portfolios.

Transamerica Life Illustrator provides industry-leading quotations with:

- Ability to run quotes offline using the offline desktop version of the tool
- Agent single sign-on (SSO) from Transamerica's Agent Home and myWFG.com
- Customizable quote output for clients
- More streamlined user experience for agents
- Simple input fields and an intuitive interface to run illustrations

NOTE: Term quotes and Living Benefit Rider supplement reports are not available for Oregon due to pending state advertising approval. A basic illustration for FFIUL is available for Oregon.

[TABLE OF CONTENTS](#)

HOW TO ACCESS.....	1
LIFE ILLUSTRATOR TOOL FUNCTIONALITY	7
INSURED SECTION.....	8
POLICY DESIGN	8
RIDERS.....	8
OUTPUT DESIGN.....	9
USER INTERFACE AND NAVIGATION.....	9
GENERAL.....	10

[HOW TO ACCESS](#)

TAN and Brokerage

Q1. How can TAN and Brokerage agents access Transamerica Life Illustrator?

A. Brokerage and TAN agents will go to Transamerica.com and log in using their credentials, which will direct them to secure.transamerica.com to access the Agent Home page. From there, click on the Transamerica Life Illustrator tile. Agents who have not registered for secure.transamerica.com will need to do so to access Transamerica Life Illustrator.

Brokerage agents can also continue to use the Winflex platform and will have access to the newly designed output.

Q2. How can TAN and Brokerage agents use Transamerica Life Illustrator offline?

A. Agents can use Transamerica Illustrator offline. This will require a Windows 10 or higher, Intel 5th generation (or newer) CPU or AMD Ryzen (or newer) CPU, and 8GB of RAM system. This is **not** available for Mac or Apple products or with Windows emulators.

To use offline, go to Agent Home at secure.transamerica.com, select TRANSAMERICA LIFE ILLUSTRATOR, and then DOWNLOAD NOW. You'll see an option to save a copy of the tool to your computer for use when you're offline.

You will be provided a unique download code you'll need later. Copy the download code and simply follow the directions on the screen (sample below).

From your download folder, click on the file labeled ".exe," and a series of messages/windows will guide you through the installation. See below.

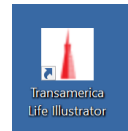
Prompts you'll see

1. Trust Transamerica Life Illustrator
2. An expanded view of #1
3. Windows Defender Protected Your Screen
4. An expanded view of #3
5. Welcome to the Installation Wizard
6. Select Destination (WELIS branded)
7. Completing the Installation Wizard – info is gathered
8. Completing the Installation Wizard – completed

Select

SHOW MORE
KEEP ANYWAY
MORE INFO
RUN ANYWAY
NEXT
NEXT
NEXT
FINISH

When finished, an icon will appear on the desktop. This should take less than 1 minute.



Should you decide to *uninstall* this feature:

1. On your computer, open Settings/ Apps & Features/Transamerica Life Illustrator
2. Click UNINSTALL
3. Click UNINSTALL again
4. Are you sure? YES
5. Completed the Installation Wizard- click FINISH

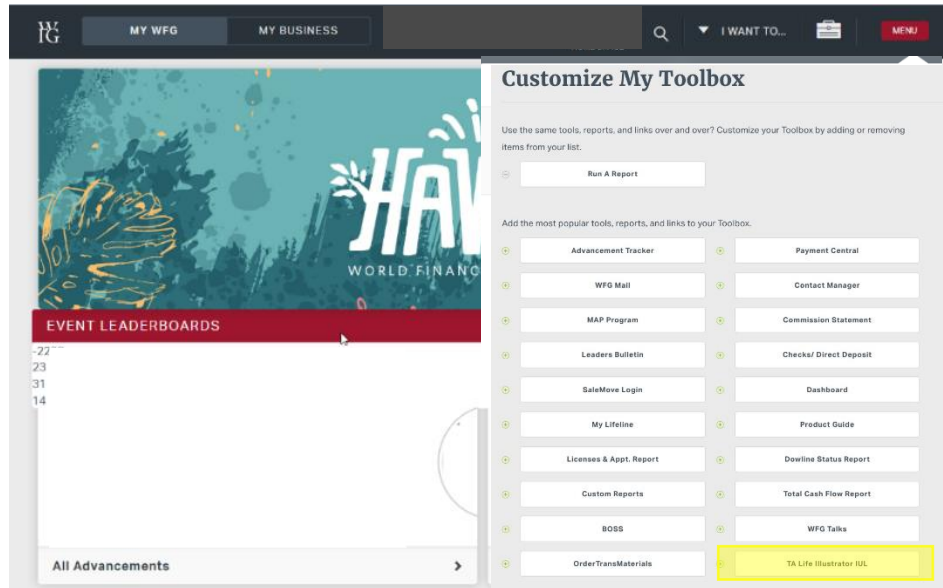
Continued on next page

Q3. How can WFG agents access the Transamerica Life Illustrator tool?

A. Agents can go to MyWFG.com and select Transamerica as the preferred carrier. If you have not created an account on MyWFG.com, you must do so to access the illustration tool. Once logged in, agents have two options to get to the Transamerica Life Illustrator tool:

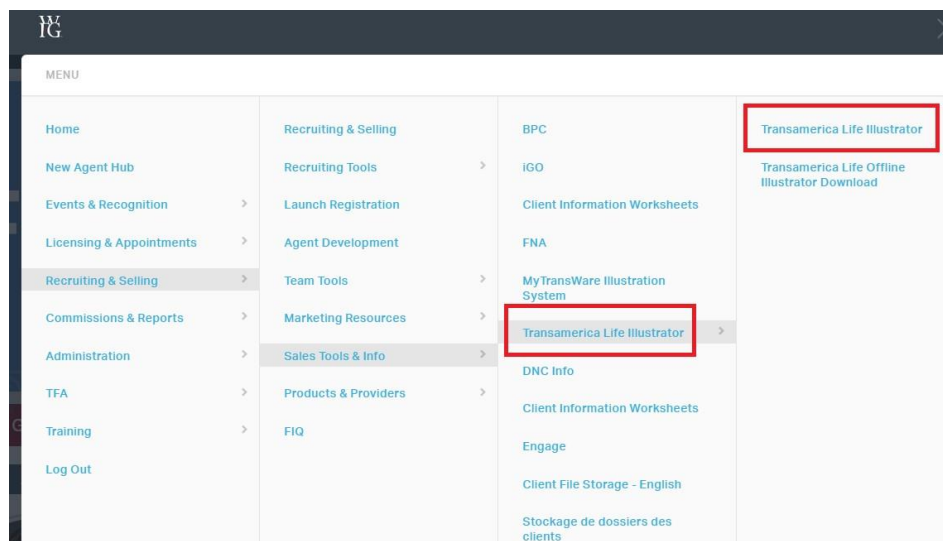
Option 1

Via MY TOOLBOX

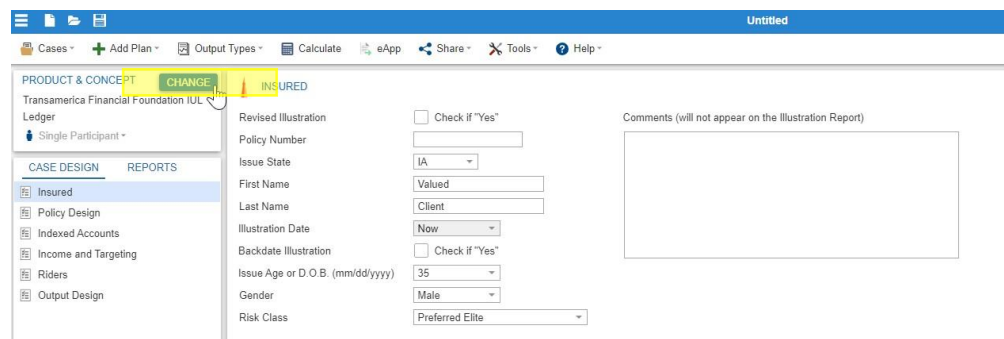


Option 2

Transamerica Carrier Landing page – Menu > Recruiting & Selling > Products & Providers > Preferred Providers > Transamerica Life Insurance Company



After selecting Transamerica Life Illustrator, the system will launch and automatically default to FFIUL. You can then change the type of policy by selecting CHANGE.



Q4. How can WFG agents access the offline version of Transamerica Life Illustrator tool?
A. You can run Transamerica Life IUL illustrations or quotes without being connected to the internet using the *Transamerica Life Illustrator Offline Download*. It's available offline for those with Windows 10 or higher, Intel 5th generation (or newer) CPU or AMD Ryzen (or newer) CPU, and 8GB of RAM. This is **not** available for Mac or Apple products or with Windows emulators.

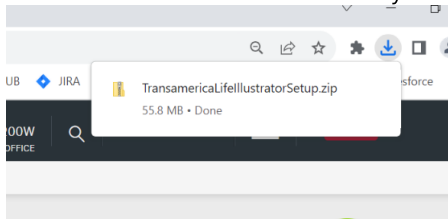
Download from TLIC.Transamerica.com: Log in, click **Resources** at the top of the screen, select **Web Based Tools**, from the dropdown menu, click **Transamerica Life Illustrator**, lastly click **Download Now**.

Download from myWFG:

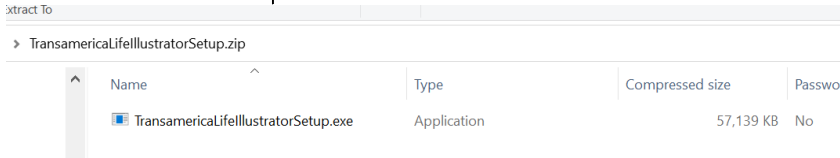
1. To access the *Transamerica Life Offline Illustrator Download*, please follow this path on MyWFG.com: *Recruiting & Selling> Sales Tools & Info> Transamerica Life Offline Illustrator Download*.
2. Select **Transamerica Life Offline Illustrator Download**.
3. Save *Transamerica Life Offline Illustrator Download* to your Toolbox
4. Click **Download Now**



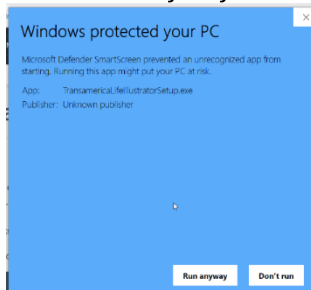
5. The file will now be available in your browser. Click the arrow and the file will open



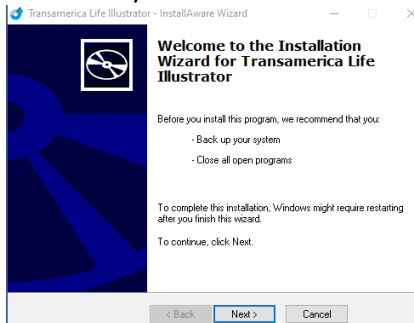
6. Double-click on the zip file



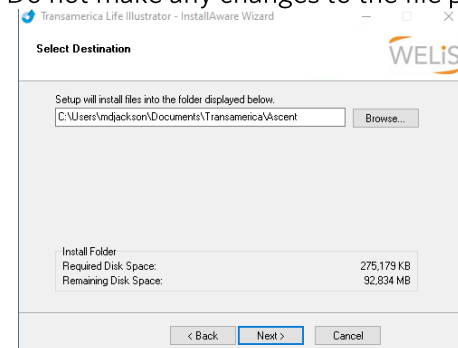
7. Click Run Anyway



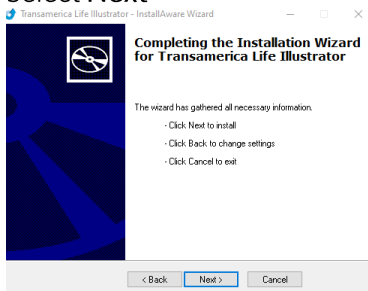
8. Click **Next**, and the file installation process will begin



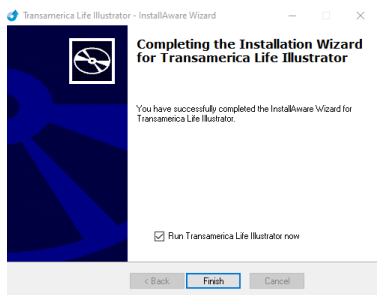
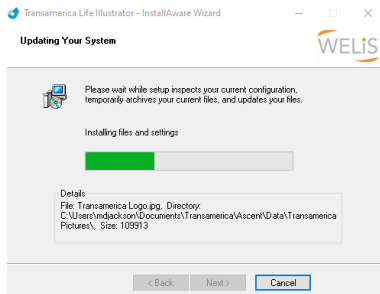
9. Do not make any changes to the file path, click **Next** and go through the file installation process



10. Select **Next**

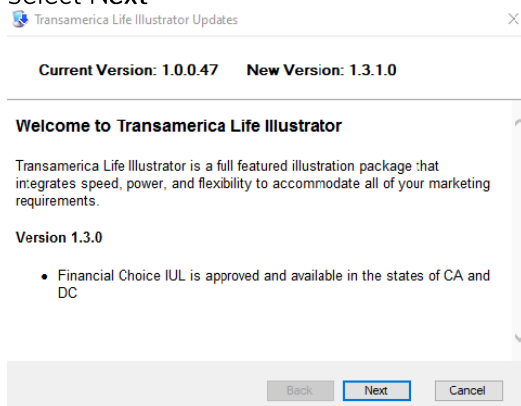


11. Allow any updates to automatically run and then select **Finish**

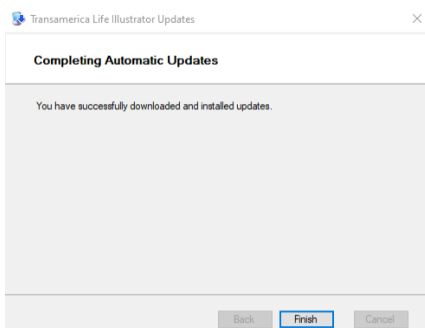


12. Enter the Install Group Password

13. Select **Next**



14. Select **Finish**. After the installation process is complete, *Transamerica Life Offline Illustrator Download* will automatically open.



15. Select the **Producer Icon** on the top right of the screen.

16. Enter First Name, Last Name, Street, City, State, Country, Zip Code, Phone and then select **Save to Database**

Q5. If an agent runs an illustration using the Transamerica Life Illustrator offline/desktop version, will they see their illustration cases in the online version of the tool?

A. Yes, only if they name and save the case to their computer. From Transamerica Life Illustrator, agents can click the CASES tab and select Upload. This allows them to search for the illustration case(s) saved to their computer and upload it to the online version of the illustration tool.

TRANSAMERICA LIFE ILLUSTRATOR TOOL FUNCTIONALITY

Q6. Will Brokerage agents see any changes to quotes on Winflex for the IUL or Term products?

A. Yes. See below.

- Redesigned *Trendsetter® Super* and *Trendsetter® LB* Term Reports:
 - Quote Summary - highlights important policy coverage and benefit details
 - Visually appealing, professional-looking quote reports
- Redesigned Living Benefit Rider Reports (TERM and IUL):
 - Robust descriptions and benefit summaries for Terminal, Chronic, and Critical Illness accelerated death benefits
- Redesigned *Transamerica Financial Foundation IUL®* (FFIUL) and *Transamerica Financial Choice IULSM* (FCIUL) illustrations:
 - Ability to vary the illustrated rate by duration
 - Roth IRA Alternative Strategy (FCIUL)
 - Personal Accumulation Strategy (FCIUL and FFIUL)
 - Ability to include more than one 1035 exchange
 - Easy-to-read visual examples of accelerated payout for up to 4 different claim ages

For Agent Use Only.

INSURED SECTION

Q7. Where can agents change the product to run an illustration?

A. Once in the Transamerica Life Illustrator:

- Click on the CHANGE button located in the PRODUCT & CONCEPT box at the upper left corner
- A new window will open, displaying the IUL and Trendsetter products

Q8. Once the agent selects a product, how can they start running the illustration?

A. Agents will see a navigation box with CASE DESIGN to the left of the screen, below the PRODUCT & CONCEPT box. This is where they will input client and illustration information and options for the following sections to run an illustration:

- Insured
- Policy Design
- Riders
- Output Design

Q9. Will the agent need to know the client's date of birth (DOB) to run an illustration?

A. No, not at the time of illustration.

TIP: It's recommended that a DOB is provided on the Insured screen so agents don't have to go back to the Case Design and Insured section and enter the client's DOB later.

POLICY DESIGN

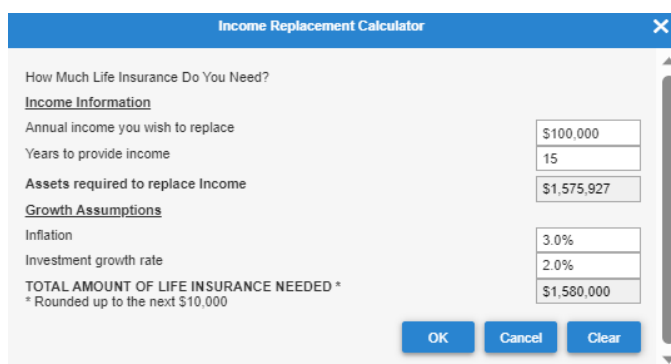
Premium and Death Benefit

Q10. What solve options are available in the Policy Design section?

A. Agents will be able to solve for the death benefit and premium based on options available for the Trendsetter products and the needs of their clients. Level term lengths can also be selected within this section of the Illustrator tool.

Q11. Can agents determine income replacement when solving for premium or death benefit?

A. Yes. Agents will see a link to the Income Replacement Calculator (see below) next to the death benefit option, allowing them to calculate how much life insurance they need.



The screenshot shows a window titled "Income Replacement Calculator" with a close button (X) in the top right corner. The window contains the following sections and input fields:

- How Much Life Insurance Do You Need?**
 - Income Information
 - Annual income you wish to replace: \$100,000
 - Years to provide income: 15
 - Assets required to replace Income: \$1,575,927
 - Growth Assumptions
 - Inflation: 3.0%
 - Investment growth rate: 2.0%
 - TOTAL AMOUNT OF LIFE INSURANCE NEEDED ***: \$1,580,000
 - * Rounded up to the next \$10,000
- At the bottom are three buttons: **OK**, **Cancel**, and **Clear**.

RIDERS

Q12. Are there any changes to the existing rider options for the Trendsetter products?

A. All riders will be available to include with the quote, and the Terminal Illness Benefit is inherent to the policy.

OUTPUT DESIGN

Q13. What is the purpose of the REPORTS & FLYERS screen?

A. This feature allows agents to customize the report (illustration) designs for their clients. It offers approximately 30 cover photo images to select from and all the information and disclosures on the illustration. Below is a list of these items:

- Bank Option (typically used for Brokerage agents working with other financial institutions)
- Cover Photo Options
- Why Transamerica
- Input Summary
- Internal Rate of Return
- Term duration comparison
- Tax Bracket Option

Q14. What illustration output options are available?

A. Agents can select from a Values output, PDF output, or both by clicking the OUTPUT TYPES button on the top Tool Bar. The Values option provides the quote's Tabular Detail (summary), and the PDF option offers a new color and easier-to-follow marketing style quotes.

Q15. Can agents still use the myTransware® to run product illustrations?

A. No, myTranswareSM is not available to run quotes as of April 26, 2024. Please use Transamerica Life Illustrator to run illustrations/quotes.

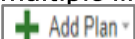
USER INTERFACE AND NAVIGATION

Q16. Where can agents save illustration cases?

A. Cases can be saved by clicking the Cases tab on the top Tool Bar. This tab also allows agents to do the following:

- View Recent Cases
- Start a New Illustration
- Open an Existing Illustration Cases
- Open Favorite
- Save & Save As Options
- Upload & Download Options for Saved Illustrations

Q17. How can agents run multiple illustration scenarios for a client?


A. Agents can click on the  dropdown and select one of the options shown below:

- New Business Plan (illustration)
- New Plan (See Plan Manager for details)
- New Plan with Same Client Data

Q18. Can agents email an illustration to their clients or themselves?

A. Yes. Clicking on the  icon on the top Task Bar allows agents to email or save reports.

Q19. What other tools are available in the Transamerica Life Illustrator tool?

A. The  icon on the top Task Bar provides the ability to manage producer information such as name, agent number, address, etc. Agents can select Options that provide pre-set defaults for new illustration cases that can be changed and saved as their favorites. Another option is changing the display setting, output settings, and the display mode for illustration PDFs.

GENERAL

Q20. Will Brokerage agents still be able to run illustrations using the Winflex illustration platform?

A. Yes. The experience on the Winflex illustration platform will be similar to the Transamerica Life Illustrator tool.

Q21. Who can agents contact if they have issues running an illustration using the new Transamerica Life Illustrator tool?

A. Agents can contact their respective Transamerica Sales Desk for assistance with running illustrations. If they are experiencing technical web issues, please use the following contact information.

- Brokerage: Transamerica Website Technical Support at 866-301-2473
- TAN: TAN Tech at 800-779-5502 or 410-223-4485, option 7
- WFG: WFG Sales Desk at 800-322-3796, option 6

For Agent Use Only. Not For Use With The Public.

3069902 R1

©2024 Transamerica Corporation. All Rights Reserved.