WINNING BY DESIGN

GETTING STARTED WITH THE TRANSAMERICA LIFE ILLUSTRATOR

The Transamerica Life Illustrator provides sleek, streamlined reports that are informative, easy to understand, and highly customizable so you can tailor illustrations and quotes to help meet individual client needs. We're proud to offer our full suite of products on Life Illustrator to help you sell more efficiently and grow your Transamerica business.

INTUITIVE, EASY TO NAVIGATE	HIGHLY CUSTOMIZABLE, PERSONAL, AND DYNAMIC	SELL MORE EFFICIENTLY
• Policy summary highlights important policy coverage and case design values • Benefit snapshot provides a quick view of projected policy benefits compared to premiums paid (IUL only) • Visually appealing and robust product features and benefits overview	• IUL sales strategy reports help highlight the product's value proposition • Transamerica brand strength and product benefits • Select from a wide variety of cover images to match the diversity of your clients • More informative and transparent long term care and living benefits reports	• Single sign-on for easy access without needing additional login credentials • Simple input fields and an intuitive interface to easily run reports • Customizable defaults to quickly run cases • iGO® e-App pre-populates and automatically attaches the illustration (IUL only) • Quickly switch between all products to run quotes and illustrations

YOUR STEP LIST

myWFG.com			TRANSAMERICA LIFE ILLUSTRATOR		
Log in to myWFG.com	Choose Transamerica as the preferred carrier	Go to "Helpful Links" and click "Transamerica Life Illustrator" to launch the tool	Click "Change" within the Product and Concept section to update the product	Set up your case design	Run illustration/ quote and save the case

PRO TIP:
Add Life Illustrator to your toolbox for easy access in the future
Click **My Toolbox**
Click **Customize**
Click the **+** sign next to TA Life Illustrator
Select **Yes** to confirm adding the tool

Note:
Your toolbox can only hold 10 items, you may need to delete a tool in order to add it.

TRANSAMERICA®

Once you have selected your product:

1 Set up your case in the CASE DESIGN window. Add the necessary client and policy information needed to run the quote or illustration (Insured, Policy Design, Riders, etc.)

PRO TIP:

For Term and Lifetime: Click **Income Replacement Calculator** under Policy Design to help determine your client's coverage needs

For Products with Living Benefits: Click on [Calculators ▾] to help determine if you have an existing policy and are within Transamerica policy limits.

2 Customize your reports within [Output Design]

- Personalize the cover image
- Select enhanced report options
- Explore personalized sales strategies (IUL only)

3 Review your settings

- If this is your first time running Life Illustrator, be sure to check that your contact information is shown correctly under the [Producer:] section
- Select [Output Types ▾] to view the illustration or quote as values and/or a PDF

PRO TIP:

Select [Tools ▾] then **OPTIONS** to set your preferences for new cases, such as your state and cover photo. Also, set your PDF display mode to "display in the current window" for easier viewing.

4 Click [Calculate] to run the quote or illustration

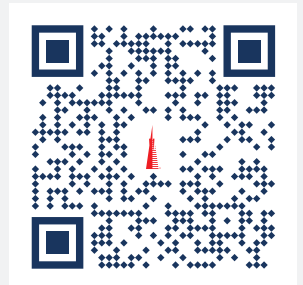**5** Save and name your client's case under [Cases ▾]

When your client is ready to apply for coverage:

6 **For IUL:** Click [eApp] to send the final illustration to iGO

⚠ **Important:** Make sure the insured's date of birth has been captured, as it is required to send the illustration to iGO

For all other products: Navigate back to myWFG and launch the iGO e-App to start a new application

Do you need to run a quote or illustration without an internet connection?

Scan here to learn how to download the offline version of Life Illustrator

SCAN ME

TRANSAMERICA®

The future starts today.

Visit: transamerica.com