WINNING BY DESIGN

**TRANSAMERICA LIFE ILLUSTRATOR
SOFTWARE DOWNLOAD INSTRUCTIONS***

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

- Simple input fields and an intuitive interface to easily run reports
- Customizable defaults to quickly run cases
- Quickly switch between all products to run quotes and illustrations

YOUR STEP LIST

Log in to TransACT >	Software Downloads >	Transamerica Life Illustrator >	Save a copy of tool to your computer for offline use.

* Software download requires a Windows 10 or higher, Intel 5th generation (or newer) CPU, or AMD Ryzen (or newer) CPU, and 8GB of RAM. The tool does not support Mac environments or the use of Windows emulators.

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

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Log in to TransACT	>	Software Downloads	>	Transamerica Life Illustrator	>	Save a copy of tool to your computer for offline use.

When you click on the file labeled ".exe", a series of messages/windows will appear to guide you through the install. This is normal.

YOU'LL SEE	SELECT
1. Trust Transamerica Life Illustrator	SHOW MORE
2. An expanded view of #1	KEEP ANYWAY
3. Windows Defender Protected Your Screen	MORE INFO
4. An expanded view of #3	RUN ANYWAY
5. Welcome to the Installation Wizard	NEXT
6. Select Destination (WELIS branded)	NEXT
7. Completing the Installation Wizard – info is gathered	NEXT
8. Completing the Installation Wizard – completed	FINISH

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

System requirements: Windows 10 or higher, Intel 5th generation (or newer) CPU or AMD Ryzen (or newer) CPU, and 8 GB of RAM. The tool does not support Mac environments of the use of Windows emulators.

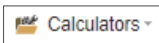**Should you decide to *Uninstall* this feature:**
1. On your computer, open Settings/Apps&Features/Transamerica Life Illustrator
2. Click UNINSTALL
3. Click UNINSTALL again
4. Are you sure? Click YES
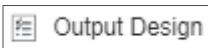5. You've Completed the installation Wizard – click FINISH

HOW TO RUN AN ILLUSTRATION OR QUOTE

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)

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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 Navigate back to Agent Home and launch the iGO® e-App to start a new application

For IUL: Prior to launching iGO, download and save the final illustration PDF from Life Illustrator. Attach the illustration PDF when completing the client's e-App.

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The future starts today.

Visit: transamerica.com