

LIST BILL

List Bill: What It Means	<p>This is a method of premium bill payment that allows clients to have premiums deducted from their paychecks and submitted by their employer.</p>
How It Works	<p>The agent must have five (5) policies that can be:</p> <ul style="list-style-type: none"> • A mix of pending and in force • A mix of any policies that are eligible for List Bill <p>Groups of Pending Cases Only</p> <ul style="list-style-type: none"> • List Bill numbers that are not available for pending cases and are not associated with a current List Bill group • The agent advises New Business that the policy will be part of a List Bill • A List Bill number (or billing control number) is assigned to the group <ul style="list-style-type: none"> - It's possible to have multiple List Bill numbers if the group is composed of different products • Premium bills are not sent for pending applications <ul style="list-style-type: none"> - Only in force policies are listed on premium bills <p>Groups with <i>In force and Pending cases</i></p> <ul style="list-style-type: none"> • The agent advises New Business of the List Bill number on each application and submits the appropriate forms with the application. • If an in force policy is going to be part of the new group, the agent advises Customer Service of the policy's inclusion in the group and submits the appropriate form. <p>Save Age is Available</p> <ul style="list-style-type: none"> • The client must agree to pay all of the back premiums prior to issue.
Eligible Products	<ul style="list-style-type: none"> • <i>Trendsetter® Super Series</i> • <i>Trendsetter® LB</i> • <i>Transamerica Financial Foundation IUL® (FFIUL)</i> • <i>Transamerica Financial Choice IUL® (FCIUL)</i> • <i>Dynamax</i> • <i>LP95</i> • <i>Transamerica LifetimeSM (formerly Lifetime Whole Life®)</i>
Ineligible Products	<ul style="list-style-type: none"> • <i>Solutions Series</i> • <i>Conversion Whole Life</i> • <i>TransAce CV</i>
Questions	<p>The product is handled by New Business</p> <p>Premium</p> <ul style="list-style-type: none"> • Email for List Bill: MonLife only financialPayrolldeduction@transamerica.com • Email for List Bill: TAN FFIUL, FCIUL, Trendsetter shtlpbrokeragegroup@transamerica.com

	Employer Pays All Premium	Employee Pays All or Part of Premium
Payroll Deduction Form	<p>Needed for the first five (5) policies in the group. When adding a new group member, advise New Business of the List Bill number for the group.</p> <p>Only one form needs to be submitted for the group.</p> <p>Frequency of billing must match that listed on the application.</p> <p>Must include the following:</p> <ul style="list-style-type: none"> • Name of the group • Billing address for the group • Billing frequency • Employer's signature <p>Form is signed by the EMPLOYER.</p>	<p>Each application or in force policy needs a separate form. Section 2 only needs to be completed on one application in the group.</p> <p>The group's List Bill number needs to be written on each form.</p> <p>Frequency of billing must match that listed on the application.</p> <p>Amount of premium to be deducted must be noted on the form. For flexible premium policies, the amount of premium must be equal to or greater than the amount of premium needed to issue the case.</p> <p>Form is signed by EMPLOYEE only.</p>
Payroll Deduction Form Number	<p>Trendsetter, FFIUL, and FCIUL E-IPS02296 <i>TLIC/TPLIC Payroll Deduction Form</i></p> <p>Transamerica Lifetime PAYDD2016 Payroll Deduction Form</p>	<p>Dynamax, LP95 PDM-002 - Generated by iGO® <i>Payroll Deduction Authorization Form</i> OR E-IPS02296</p>
E-Application Tips	<p>FFIUL, FCIUL, and Trendsetters in Non-ICC States If there is no option in iGO for the applicant to choose Payroll Deduction/List Bill and complete the necessary forms:</p> <ul style="list-style-type: none"> • Specify on the Application Supplement (overflow) that the client wants List Bill or call or send in the form requesting the payment method be updated to reflect payroll deduction <p>FFIUL, FCIUL, and Trendsetters in ICC States If there is no option in iGO for the applicant to choose Payroll Deduction/List Bill and complete the necessary forms:</p> <ul style="list-style-type: none"> • Select Other in payment area • Attach appropriate payroll deduction forms to the application 	
How to Obtain List Bill or Billing Control Number	<p>Existing Group</p> <ul style="list-style-type: none"> • Dynamax, LP95, and MonLife products - Email: magpayroll@transamerica.com • <i>Transamerica Lifetime</i>SM - Email: TLPCRgrouppremium@aegonusa.com • <i>Trendsetter</i>[®] LB, <i>Trendsetter</i>[®] Super, FFIUL, and FCIUL - Email: afpcrtiigsdprocessor@aegonusa.com Typical response time is two (2) business days <p>New Business</p> <ul style="list-style-type: none"> • After receiving application(s), New Business contacts the List Bill team to assign a billing control number. • The agent does not need to include the billing control number on the application at submit. • The agent must communicate to New Business that each application being submitted is to be in one List Bill grouping. 	
Payment Modes Available	<p>Monthly Quarterly Annually Semiannually</p> <p>Note: Civil Service allows biweekly, semimonthly, and monthly.</p>	

	Employer Pays All Premium	Employee Pays All or Part of Premium	
Premium	<p>Needed on case to issue</p> <p>Needed on case for commission and placement credits</p> <p>Client can elect to pay the premium until the employer payments begin if they want to have conditional coverage.</p> <ul style="list-style-type: none"> • Premium must be received within 24 hours of application for conditional coverage to be effective • If premium is paid after 24 hours, it will be refunded • Billing frequency must be noted • Employer signature <p>Use monthly billing: Employer can deduct from the client's paycheck based on their pay schedule and then submit total for the month.</p>	<p>Needed on case to issue</p> <p>Needed on case for commission and placement credits</p> <p>Client can elect to pay the total premium amount until the employer/employee shared payments begin if the employee wants to have conditional coverage.</p> <ul style="list-style-type: none"> • Premium must be received within 24 hours of application for conditional coverage to be effective. • If premium is paid after 24 hours, it will be refunded. 	
Billing Changes on In Force Policies	<p>Employer submits the following:</p> <ul style="list-style-type: none"> • Copy of employee billing • Payment • Notation of any changes, additions, or deletions requested <p>Agents should not apply any premium payments. Submit any payments received to Transamerica for processing by the List Bill team.</p>		
Premium Mailing Addresses	<p>FFIUL, FCIUL, Lifetime</p> <p>Transamerica 6400 C St SW MS 1310 Cedar Rapids, IA 52499</p>	<p>Trendsetter Super, Trendsetter LB</p> <p>Transamerica 6400 C St SW MS 40 Cedar Rapids, IA 52499</p>	<p>Dynamax</p> <p>Transamerica 6400 C St SW MS P35 Cedar Rapids, IA 52499</p>

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