



DocuSign Ancillary Documents Process Flow


Insurance / Investments / Retirement

Application Number: FEX703590
Proposed Insured's Name: TIM HIDDLESTON
Plan: Transamerica Life Easy Solution
Face Amount: \$25,000

Hi, TUAN A:

Thanks for doing business with Transamerica. For this application, we still need the following:

Note: if your client needs to alter a document originally provided with the app, please make sure the insured/owner initials and dates next to any changes made, re-signs and current-dates the signature area, and then return items to us the way you usually do.

We also need the following completed through DocuSign®:

- LREP-AR-0917 : LREP-AR-0917
- Consent to accept delivery by an electronic method
- Consent to do Business Electronically
- ICC22 T-AP-WL11IC : Please re-sign and current date the signature page of the application due to newly dated replacement form

[Access the forms](#)

These items are needed by **11/16/2023**. Additional items may be requested after further review. Please continue monitoring the Agent website and your inbox for additional messages.

If you have questions about this message, reach out to your Transamerica representative. This email was not sent from a monitored mailbox.

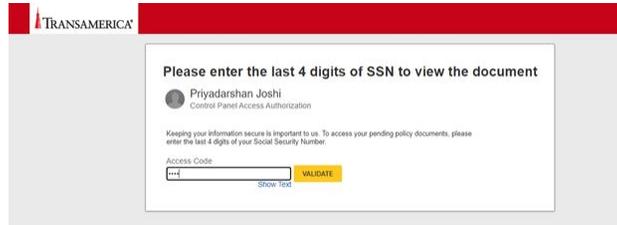
Initial DocuSign Email(s): App Requirements Needed

Customers (insured, owner, payor) will receive their own emails at the same time as the agent and asked to complete forms as necessary. Each customer role will only be able to view forms applicable to them.

- Simply select "Access Forms" to get started.

Agent Specific: The agent should receive an email with all the forms listed in the email template. Depending on the form(s) and state variations, the fields or forms the agent needs to sign or complete may vary:

1. If there is a form the agent needs to sign, the link will only display the required documents the **agent** needs to complete.
2. If there are no forms the agent needs to sign, the link will only display the outstanding documents the clients need to sign, and no action is needed from the agent.

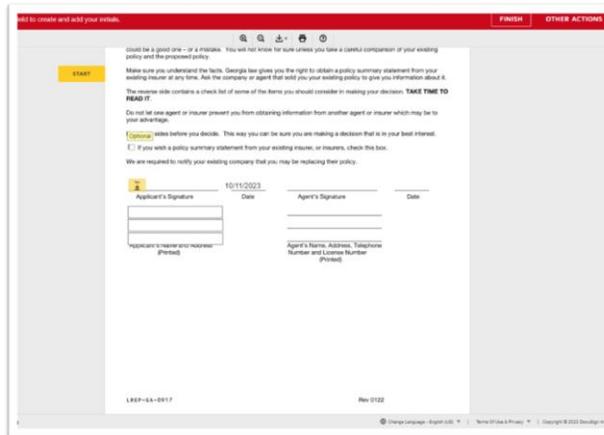


Next, they will be prompted to enter the last 4 of their SSN to view and sign the documents.

Agent Specific: This is the same prompt the agent will receive when action on their part is required.



After signing in with their SSN, they will need to select the box "I agree to use electronic records and signatures."



Then, select start from the left-hand side, check any applicable boxes, and follow the prompts.

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