

FFIUL POLICY

PDFS ON TRANSACT®

SUMMARY

Beginning June 24, 2022, agents and firm contacts can view and download new *Transamerica Financial Foundation IUL*® (FFIUL and FFIUL with Long Term Care) policy PDFs on TransACT®. FFIUL policy PDFs will be available for cases mailed or eDelivered on or after June 23, 2022.

The FFIUL policy view and download feature gives agents the ability to:

- **IMPROVED VISIBILITY:** Access to issued FFIUL policies and delivery requirements in real-time.
- **FASTER CLIENT COVERAGE:** Communicate with clients about any delivery requirements to help speed up policy placement.
- **SUPERIOR CUSTOMER SERVICE:** Proactively notify and set client expectations before the client receives the policy.
- **BETTER RECORD RETENTION:** Save digital copies of FFIUL policies to manage in force business efficiently.

Q1. When can I view a policy PDF for FFIUL policies?

A. You can access policy PDFs on TransACT® beginning June 24, 2022, for policies issued and mailed on or after June 23, 2022.

Q2. Where can I find the FFIUL policy PDFs on TransACT®?

A. In the Delivery Requirements section. Once a FFIUL policy has been issued and mailed, a PDF icon will display next to the Requirement labeled Policy Document. Clicking on the Policy Document PDF icon will open the FFIUL policy PDF.

Q3. Will policy owners still receive their contract by mail or eDelivery when policy documents are viewable on TransACT®?

A. Yes. The view and download feature doesn't replace the policy contract mailing or eDelivery process.

Q4. Are the documents policy owners receive by mail the same as the FFIUL policy PDF available on TransACT®?

A. Yes, though please be aware that there may be multiple illustrations in the policy PDF, and the order of the documents may be different.

Q5. Can I view and download the policy PDF for a FFIUL policy that has been issued but not mailed?

A. No. The policy must be issued and physically mailed or eDelivered to view and download the policy PDF. You can see the Issued Date and Mailed Date fields in the Basic Information section.

Q6. Can I access FFIUL policy PDFs for policies with delivery requirements?

A. Yes. PDFs of the policy contract can be viewed and downloaded for policies with or without outstanding delivery requirements.

Q7. Can I view and download FFIUL documents besides the FFIUL policy contract PDF documents?

A. The new FFIUL policy PDF feature provides the ability to view and download newly issued FFIUL policy contract and delivery requirement PDFs only, and does not replace or alter existing features or tools that may be available for other document types.

Q8. Can I get PDFs of policies issued before June 23, 2022?

A. No. Only FFIUL policies mailed or eDelivered on or after June 23, 2022, will have a FFIUL policy PDF available on TransACT®.

Q9. Will policy PDFs be made available on TransACT® for reissued FFIUL policies?

A. No. Policy PDFs for reissued policies will not be available online.

Q10. How long can I view and download FFIUL policy PDFs on TransACT®?

A. FFIUL policy PDF documents will be available on TransACT® for 90 days from the Mailed Date.

Q11. Can I view and download FFIUL policy PDFs on agent portals other than TransACT®?

A. Not at this time. The view and download feature is currently only available for FFIUL policy PDFs on TransACT®. However, we are working to make the view and download feature available on other agent portals as quickly as possible. We'll let you know once we have plans in place.

Q12. Can I view and download policy PDFs for other products?

A. The view and download feature is also available for the Trendsetter term policies on TransACT®.

Q13. Who can access FFIUL policy PDFs on TransACT®?

A. The Writing Agent can view and download newly issued FFIUL policies that they have written and that were mailed or eDelivered on or after June 23, 2022. General Agencies and Senior Marketing Directors can view and download newly issued FFIUL policies that were mailed or eDelivered on or after June 23, 2022, for their downline.

Q14. How do I access TransACT®?

A. For TransACT® access, please call Agent Technical Support at 1-800-742-7005.

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