Agent eSignature flow

To help keep your business running smoothly, we've added several electronic signature options for amendments, new business requirements, and in force forms requiring a signature.

Here's how the flow works.

Agent determines if they want to submit "requirements" via electronic signature

If yes, agent receives required forms via existing BAU process (portal or email/call to Transamerica to obtain)

Agent creates their own account with an approved eSignature platform of their choice

eSignature platform provides "training" to agent on how to initiate a signing ceremony (e.g., upload forms and enter signer credentials)

Agent sends signing ceremony package to client within the approved eSignature platform

Client completes their signing within the approved eSignature platform

Agent gets pdf of the completed signing ceremony within the approved eSignature platform

The pdf includes the signed forms along with a summary page (usually the last page of the pdf) that includes signer details (name, email)

Agent sends completed pdf to Transamerica via existing BAU options (portal, email, or mail)

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

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