START USING THE AGENT + ADVISOR PORTAL

EASY START GUIDE

We recognize you want to work with a company that makes it easy to manage your business. That's why we built the Agent + Advisor Portal, a secure, modern platform for you to view and manage your annuity book of business.

Follow the instructions below to access the portal

WHAT YOU'LL NEED

- ✔ Your advisor number
- ✔ Your computer or tablet
- ✔ For the best experience, use Chrome, Firefox, or Edge

CREATING AN ACCOUNT

1. Click **HERE** to register now
2. Ensure that Financial Professional is selected. Enter your last name, date of birth, and advisor number (capitalize all the letters and include any leading zeros, if applicable.) Complete the CAPTCHA (to confirm you are not a robot).
3. Click **NEXT**
4. Follow these **EASY STEPS** to create your secure account:
   - Create a username and password.
   - Select a primary email address for your account profile. If you only have one email it will already be pre-selected, click **NEXT**
   - Validate your email. You'll receive a security code in your inbox. Enter it on the page, click **SUBMIT**

     Security code

   - **OPTIONAL:** Add an alternate email address or mobile number. Note that all security validation codes will be sent to your alternate email or mobile number, if you provide them.
   - Select and answer three security questions to protect your account, click **NEXT**
   - Agree to terms and conditions and the electronic business consent, click **FINISH AND GO TO MY ACCOUNT**
5. You'll be returned to secure.transamerica.com. Log in using the username and password you just created.

CONGRATULATIONS! You now have access to the Agent + Advisor Portal to view and manage your business.

QUICK TIP: Add a bookmark to the Agent + Advisor Portal home page for easy access in the future.

Website Technical Support

Call 1-866-301-2473

Monday–Friday, 9 a.m. – 6 p.m. ET

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