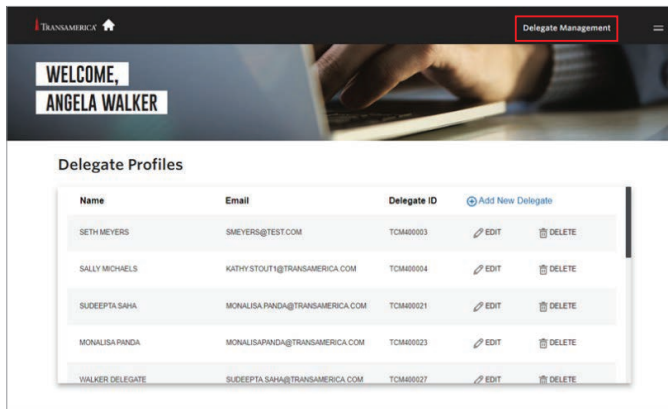


HOW TO ASSIGN DELEGATES TO AGENT HOME

FOLLOW THESE STEPS FOR EASIER BUSINESS MANAGEMENT

1. Adding a delegate

A. Under Delegate Management, click on "Add New Delegate"



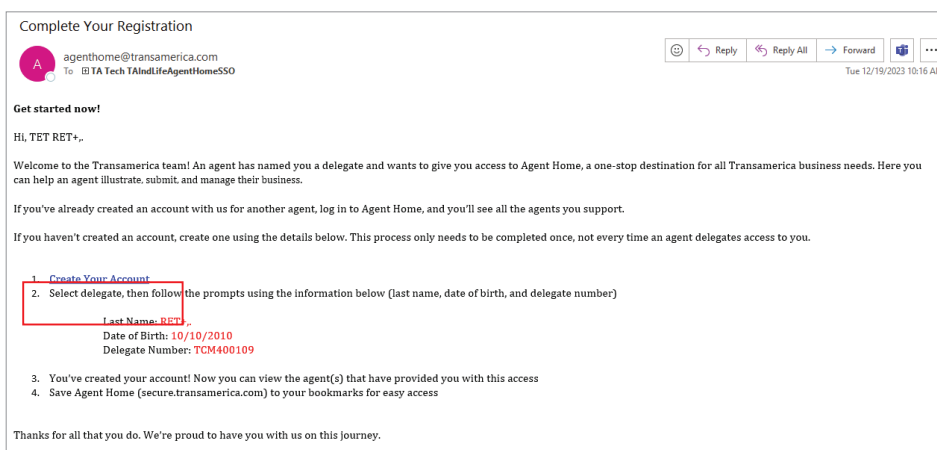
B. To search for an existing or add a new delegate

- i. To search for an existing delegate: Search using Delegate ID, first name, last name, date of birth, ZIP code, email, and/or phone number. If your delegate exists, their name will populate on the existing list.
- ii. Add a new delegate: Click **"Add New Delegate,"** then enter the identifying information (same as above)

C. You can also provide and update entitlements while adding or updating a delegate.

D. If a delegate is no longer with your organization, you can remove the delegate from your assigned list.

2. Once you add a new delegate, the delegate will receive an email to register, which includes all the necessary information and a secure link to create your account and register for Agent Home access.



3. The link will take the new delegate to a page within Agent Home where they can create an account.

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TRANSAMERICA PRODUCTS ABOUT US CONTACT Q SEARCH LOGIN

Create Your Secure Account

Step 1 of 5

Last Name*

Date of Birth* MM/DD/YYYY

Case Manager Number*

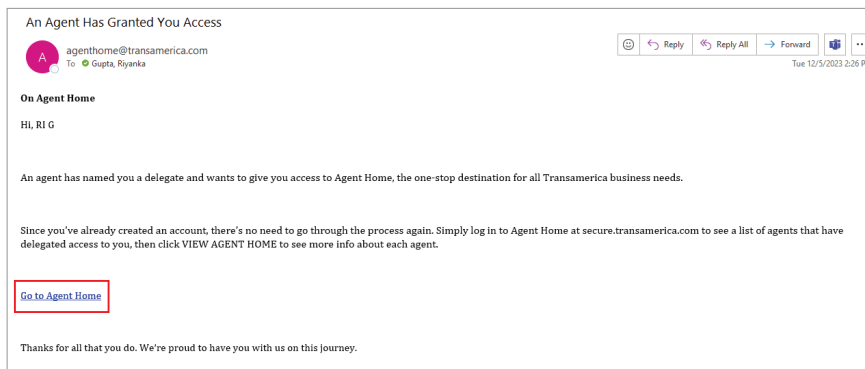
Help Us Protect Your Information
Please enter the CAPTCHA below to continue the verification process.

KGG

Type the moving characters*

Cancel NEXT *Required Fields

4. After registering with Agent Home, the new appointed delegate will receive an email similar to the one below with a link to Agent Home.



5. When the delegate logs into their account for the first time (after registration), they'll need to confirm all their identifying information.

TRANSAMERICA

WELCOME, DENISE MENSE

Your Agents

Name

BRIAN RIDDLE

VIEW AGENT HOME

Profile Check

Welcome to your Delegate portal! Before you log on, please make sure all personal information is correct. If not, please make the proper corrections before submitting.

First Name: DENISE Last Name: MENSE

Delegate Id: TCM400110 Date of Birth: 01/01/2000

Email: RIYANKA.GUPTA@TRANSAMERICA Zip Code: 75063

Confirm

LEGAL DISCLAIMERS

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NYDFS Cyber Security - Agents
Accessibility Statement
Online Privacy Statement
Do Not Sell My Personal Information

6. When logged into their account, the delegate can view the associated list of agents and access their book of business based on the entitlements.

For any questions, please contact the National Sales Desk at 800-322-3796, option 6.

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