

# TRANSAMERICA FINANCIAL FOUNDATION IUL® (FFIUL) AGENT EXPERIENCE QUICK TIPS



At Transamerica we are always looking for ways to improve the agent/client experience with our electronic application (e-App) for our Transamerica Life products. That being said, we have implemented some new experience enhancements for our *Transamerica Financial Foundation IUL®* (FFIUL) product. The following enhancements are available starting December 17, 2022.

- Flexibility to sign illustrations now digitally via iGO® e-App
- Providing New Business outstanding forms and required documents to you for all Transamerica insurance products
- Policy eDelivery is now available regardless of illustration requirement status

**Below are a few quick tips to assist in navigating the new experience and process enhancements to our iGO® e-App platform.**

- ❖ Agents can now attach a signed or unsigned illustration with the electronic application. Documents will need to be in PDF format with a total combined maximum file size of 15MB for all attachments.
- ❖ Illustrations **not signed** by the client, it will become part of the Policy Package client loose section and can be signed on delivery as part of the new single signing ceremony.
- ❖ Any electronic applications submitted prior to December 17, 2022; they **will not** need to have the client re-sign the illustration.

- ❖ Policy Package will only include **ONE** illustration in the client loose section of the Policy Package or in front of the eDelivery packet for print.
- ❖ Clients have the option to delay drafting their initial premium payment until an Underwriter approval is received when electing EFT Bank Draft as their form of payment.
- ❖ Fillable PDFs of any missing new business forms/amendments requirements will be included in the agent email to print, obtain a *wet signed* (if applicable) by the client, and uploaded on an agent web portal.
- ❖ First time agents submitting electronic applications will need to register for DocFast® to complete the eSignature process and access their Agent DocFast® Dashboard to view policies, alerts, and policy status. Visit <https://policyexpartnerportal.ipipeline.com> to access DocFast® directly.
- ❖ eDelivery of the Policy Package is **not** available in New York, **however** the illustration will be included and be part of the eSignature process.
- ❖ When clients are paying under Minimum No Lapse Guarantee (MNLG) details are now required on the Agent Report section to reduce “not in good order” (NIGO) issues.
- ❖ Any combination of parties (persons) to the contract (Insured, Owner, Payor) can electronically sign on the required areas of the Pay Form.



TRANSAMERICA®



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Questions? Contact your Transamerica Sales Desk.



**VISIT**

[Transamerica.com](https://transamerica.com)

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

Life insurance issued by Transamerica Life Insurance Company, Cedar Rapids. Not available in New York. All products not available in all jurisdictions.

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