

# WINNING BY DESIGN

## GETTING STARTED WITH THE TRANSAMERICA LIFE ILLUSTRATOR

The Transamerica Life Illustrator provides sleek, streamlined reports that are informative, easy to understand, and highly customizable so you can tailor illustrations and quotes to help meet individual client needs.

### INTUITIVE, EASY TO NAVIGATE

- Policy summary highlights important policy coverage and case design values
- Benefit snapshot provides a quick glance projected policy benefits compared to premiums paid (IUL only)
- Visually appealing and robust product features and benefits overview

### HIGHLY CUSTOMIZABLE, PERSONAL, AND DYNAMIC

- IUL sales strategy reports help highlight the product's value proposition
- Transamerica brand strength and product benefits
- Select from a wide variety of cover images to match the diversity of your clients

### SELL MORE EFFICIENTLY

- Single sign-on for easy access without needing additional login credentials
- Simple input fields and an intuitive interface to easily run reports
- Customizable defaults to quickly run cases
- iGO® e-App pre-populates and automatically attaches the illustration (IUL only)

## YOUR STEP LIST



Access Agent Home from [secure.transamerica.com](https://secure.transamerica.com). Agents without an account will need to register.



Click or scan here for log on quick tips.

SCAN ME




## HOW TO RUN AN ILLUSTRATION OR QUOTE



### Once you have selected your product:

- 1 Set up your case in the CASE DESIGN window. Add the necessary client and policy information needed to run the quote or illustration (Insured, Policy Design, Riders, etc.)


#### PRO TIP:

**For TERM:** Click **Income Replacement Calculator** under Policy Design to help determine your client's coverage needs.

- 2 Customize your reports within  **Output Design**
  - Personalize the cover image
  - Select enhanced report options
  - Explore personalized sales strategies (IUL only)

- 3 Review your settings.
  - If this is your first time running Life Illustrator, be sure to check that your contact information is shown correctly under the  **Producer** section.
  - Select  **Output Types** to view the illustration or quote as values and/or a PDF.


#### PRO TIP:

Select  **Tools** then **OPTIONS** to set your preferences for new cases, such as your state and cover photo. Also, set your PDF display mode to "display in the current window" for easier viewing.

- 4 Click  **Calculate** to run the quote or illustration

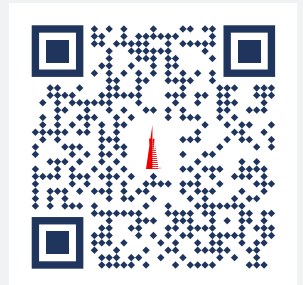
- 5 Save and name your client's case under  **Cases**

### When your client is ready to apply for coverage:

- 6 **For IUL:** Click  **eApp** to send the final illustration to iGO.
  - ⚠ Important:** Make sure the insured's date of birth has been captured, as it is required to send the illustration to iGO.
  - For TERM:** Navigate back to Agent Home and launch the iGO e-App to start a new application.

### Do you need to run a quote or illustration without an internet connection?

Click or scan here to learn how to download the offline version of Life Illustrator



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TRANSAMERICA®

**The future starts today.**

 **Visit:** [transamerica.com](https://transamerica.com)

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09/23