

FAST-TRACKING YOUR CLIENT'S APPLICATION

To help you protect more clients and get paid faster, we're speeding up our application process. This begins with illustrations. There are four paths you can take when submitting an illustration, depending on your circumstance. Each is laid out below.

Submitting a signed Illustration with the application via Illustrator directly into the e-App or manually uploading it from the attachments section.

Issued As Applied: The Illustration will be included in the policy packet via eDelivery or paper delivery in all states.

Issued Other Than Applied: The agent must upload a revised Illustration matching approval(s). The Illustration will be included in the policy packet via Paper or eDelivery and the signature can be obtained upon delivery.

Note: Effective December 2024, all Illustrations will be included in the policy packet via paper delivery.

Selecting No, you are not submitting an Illustration with the application and selecting either box: A custom Illustration matching approval(s) will be required prior to print. The Illustration will be included in the policy packet via Paper or eDelivery and the signature can be obtained upon delivery.

Submitting an unsigned Illustration or no Illustration altogether included in the application and section 13 (26 in CA & NY) is unchecked: A signed custom Illustration matching approval(s) will be required to print the policy.

- Pennsylvania:** A signed Illustration matching the application must be signed on or before the date of the application. Revised Illustration signatures can be obtained upon delivery.
- Michigan:** A signed Illustration matching the application must be received within 15 days of the application signature date. Revised Illustration signatures can be obtained upon delivery.

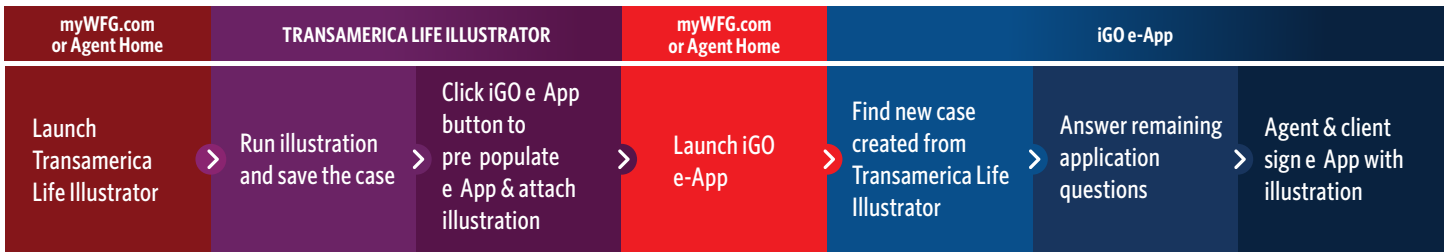
YOUR STREAMLINED PROCESS

Providing an illustration with digital application submission:



Life Illustrator provides customizable and dynamic illustrations. You can:

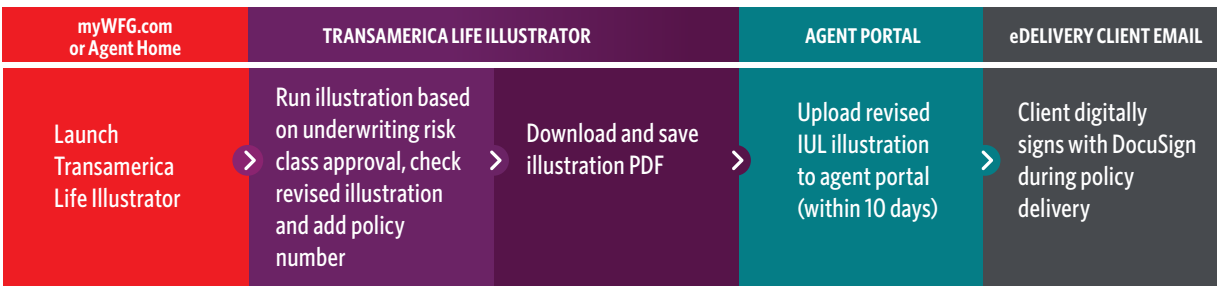
- Choose a cover image
- Select a sales concept
- See Transamerica's brand strength
- Review policy benefit snapshots
- Pre-populate the iGO® e-App



This creates a new case in iGO with pre-filled insured information and the illustration PDF attached.

Cases created from the illustration tool will have Life Illustrator in the description along with a date and time stamp, making it easy to locate.

Providing a revised illustration when policy is approved other than applied:



Visit us for the latest enhancements and tools.



Visit: transamerica.com/agent-central

Life insurance products are issued by Transamerica Life Insurance Company, Cedar Rapids, IA, or Transamerica Financial Life Insurance Company, Harrison, NY. Transamerica Financial Life Insurance Company is authorized to conduct business in New York. Transamerica Life Insurance Company is authorized to conduct business in all other states. All products may not be available in all jurisdictions.

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