

CONTACT SHEET

TAN





INTRO, TIPS, & TRICKS

Working with multiple carriers and managing all your contacts can get complicated.

We've prepared this easy-to-navigate contact sheet for our valued agents and firms. All of your common contacts are now within arm's reach to help you sell, place, and manage business.

QUICK START GUIDE

We process business on a first-in, first-out basis. This means we always work business in the order it's received. Should a mistake be identified, internal Transamerica support is able to request expedited processing to address the issue.

The standard processing time for email requests is 24–48 hours. Specific processing for various departments is detailed in this packet to provide a realistic timeframe. Escalations should be directed to your internal contact if these timeframes have not been met, however, you should first check the portal as the most up-to-date information on specific cases will always be posted there.

When reaching out to our teams, please first use the regular processing email box for the team you need to contact. If you don't get resolution from that email, then use the escalation email box (if applicable). If not, please reach out to your internal contact to escalate on your behalf.

Please do not use or share individual contact email addresses (Professional Development or Agent Technical Support being the exception). Since these individuals work primarily in their department's email box, they may not always check their personal inboxes regularly. This can cause further delays when you're trying to get help.

For escalations, please send the full email chain to your Transamerica partner so they can review what has been done, to determine the next best steps to resolve the issue the most efficient way.

The most efficient way to resolve issues is to keep one line of communication. Emailing several contacts about the same issue (without others knowing) can cause unnecessary delays. If another contact is brought in, please copy (CC:) previous individuals or teams.

Our contacts are here to help in any way they can, but we're all human. Should one of our processors ever provide incorrect information, they will be coached to ensure that information is not shared again. Keep in mind, Transamerica will not always be able to honor answers given in error.

MASTER LIFE CONTACTS

WEB PORTALS		
Agent Home	secure.transamerica.com	
AX (Agent + Advisor Experience)	transamerica.com	
TAN Central	transamerica.com/TAN-central	
Transamerica Agent Net Info	taani.transamerica.com	
Transamerica Premier	tapremier.com	
IMPORTANT PHONE NUMBERS		
Main Call In	410-223-4485	
Direct Extensions	Option #1	
Customer Service/In Force	Option #2	
Contract & Licensing	Option #3	
Commissions	Option #4	
TAN Case Management, New Business and Underwriting	Option #5	
Professional Development	Option #6	
Agent Technical Support	Option #7	
Claims	Option #8	
Exton Contact Center	800-523-7900	
Plano Contact Center	800-362-6900	
AUTHORIZED PARAMED COMPANIES		
APPS — Portamedic	800-727-2101	appslive.com
Examination Management Services, Inc (EMSI)	800-872-3674	emsinet.com
Insurance Medical Services, Inc.	877-808-5533	imspamed.com
ExamOne, Inc.	800-768-2056	examone.com
ExamOne Superior Solutions	800-898-3926	smminsurace.com
IMPORTANT FAX NUMBERS		
New Business	866-834-0437	
Contract & Licensing	877-696-6018	
Commissions	410-576-4564	
Medicare Supplement	800-235-4782	
Customer Service — Transamerica Policies	866-834-0437	
Customer Service — Monumental Policies	410-385-6903	
Claims — Transamerica	866-352-6502	
Claims — Monumental	855-206-7001	
EMAIL ADDRESSES FOR ORDERING IN FORCE ILLUSTRATIONS OR QUOTES		
Trendsetter Series sold by Transamerica Life Insurance Co.	shlaafpcustominforce@transamerica.com	
FFIUL, FCIUL , as well as universal life and interest sensitive life products sold by Monumental Life (Dynamic and Dynamax) and other Transamerica carriers	TPLICillustrations@transamerica.com	
Whole Life and Term products sold by Monumental Life (whole life products, Flex 7)	mlscdistrictemail@transamerica.com	
Note: Include policy number, name of insured, your agent ID, and your name. You must be the agent of record to order an in force illustration or quote.		

MASTER LIFE CONTACTS CONTINUED

IMPORTANT EMAIL ADDRESSES	
Attachments Only — In Force for 8-Digit Policies Starting with 0, 4, or 9, and 9-Digit Policies Starting with 6600	interimcsforward@transamerica.com
Attachments Only — In Force for 9-Digit Policies Starting with 011, 012, 013, 014, 015, 016, 8, LFC, FEX, LFT, etc.	afpcrcustomerservice@aegonusa.com
Attachments Only — New Business	securenbforms@transamerica.com
Claims — Monumental Cancer & Health Policies	maghealth@transamerica.com
Claims — Monumental Life Policies	maglife@transamerica.com
Claims — Policies Starting with 60 Through 65	lifeproclaims@transamerica.com
Claims — Transamerica Policies	taclaims@transamerica.com
Claims Status — FFIUL with LTC Rider or Standalone LTC	customercareLTC@transamerica.com
Claims Status — Not for FFIUL with LTC Rider or Standalone LTC Policies	TanClaimsStatus@transamerica.com
Commissions	commissions@transamerica.com
Contract & Licensing	tpcl@transamerica.com
Conversions to IUL & Internal Replacements — For questions about eligibility or to run illustrations, please contact the Professional Development Team	tansalesdesk@transamerica.com conversionsandinternals@transamerica.com
Conversions to Lifetime & Internal Replacements — For questions about eligibility or to run illustrations, please contact the Professional Development Team	tansalesdesk@transamerica.com finalexpensenewbus@transamerica.com
Customer Service — Medicare Supplement	lumico_agencyervices@iptiq.com
Customer Service — Monumental Policies	mlscdistrictemail@transamerica.com
Customer Service — Policy Change	tii.customerservice@transamerica.com
Customer Service — Policy Loan, Surrender, Withdrawal, and Free Look for Transamerica-Issued Policies	tii.customerservice@transamerica.com
Customer Service — Policy Loan, Surrender, Withdrawal, and Free Look for Monumental Life Policies	mlscdistrictemail@transamerica.com

MASTER LIFE CONTACTS CONTINUED

IMPORTANT EMAIL ADDRESSES	
Customer Service — Premium Collections for Transamerica-Issued Policies	tii.customerservice@transamerica.com
Customer Service — Premium Collections for Monumental Life-Issued Policies	mlscdistrictemail@transamerica.com
Customer Service — Transamerica Policies	tii.customerservice@transamerica.com
Customer Service Inquiries — Policies Starting with 60 to 65	life.customerservice@transamerica.com
Duplicate Policies and Complex Post-Issue Corrections, Research, and Inquiries	afpcrtranscomcorr@transamerica.com
iGO® e-App Tech Support	tantechsolutions@transamerica.com
New Business — Final Expense & Transamerica Lifetime SM	tancasemanagement@transamerica.com
New Business — Term & IUL	tancasemanagement@transamerica.com
New Business Escalations — Emails received prior to 3 p.m. CT will get same-day response	tancasemanagement@transamerica.com
Policy Reinstatements	tii.customerservice@transamerica.com
Policy Reissues	tlptcscorrectiveprocessing@transamerica.com
Professional Development	tansalesdesk@transamerica.com
Underwriting — International	international@transamerica.com
Underwriting — Risk Assessments	expressquote@transamerica.com
1035 Exchange — Incoming, Internal 1035 Statuses	tancasemanagement@transamerica.com
1035 Exchange — Outgoing States, Existing Policy 1035 Exchange Eligibility	mlscdistrictemail@transamerica.com
1035 Exchange — Presales Assistance	tansalesdesk@transamerica.com

WHO TO CALL, SLAs

DEPARTMENT/REASON TO CONTACT	SLA TIME
<p>Premium</p> <ul style="list-style-type: none"> • Premium Collections (In Force Policies) • Billing/Billing Issues • Timing of Premium Payments for Conversions • Applying Money to Premiums • Group Payroll • Salary Deduction • Waiver of Premium • CSFL Individual Billing Queues Billing & SSBO • Speedpay • Overdrafts • TEFRA/TAMRA • Banking & Credit Card Updates • Shortages & Grace Period • Returns: Checks, PAC, Credit Card • Payments: Lockbox, Checks, Wires 	<p>24-hour (automated response) 3 business days ETA for critical requests Same day for VUL policies 5 business days ETA for standard work</p>
<p>In Force Policy Illustrations</p>	<p>Term quotes - 5 business days; UL and IUL in force illustrations and ledgers, 10-15 business days</p>
<p>Commissions</p> <ul style="list-style-type: none"> • General Questions, Billing, Billing Issues • Change of Servicing Agent • Off Cycle • Commission Requests • Statements • History • Chargeback Rules • Advances 	<p>5 business days for general inquiries 2 business days for escalations</p>
<p>Professional Development</p> <ul style="list-style-type: none"> • Conversion Options • Illustration Support • Quote Support • Product • Questions • Riders and Benefits • Sales Support 	<p>24-48 hours for response time</p>

WHO TO CALL, SLAs CONTINUED

DEPARTMENT/REASON TO CONTACT	SLA TIME
<p>Contracting & Licensing</p> <ul style="list-style-type: none"> ▪ Contract Paperwork ▪ Termination Status ▪ Contract Status ▪ Transfer Book of Business ▪ Lack of Production ▪ Agent Holds ▪ View Information ▪ Agent Assignment Changes 	<p>Appt requests: 2-3 business days Contact info update: 5-6 business days Direct deposit update: 5-6 business days General inquiries: 5-6 business days Termination requests: 30-31 business days Agent change on in force policy: 2-3 business days</p>
<p>In Force Customer Service</p> <ul style="list-style-type: none"> ▪ Non-Escalation Issues ▪ Banking Information ▪ In Force Questions ▪ General Maintenance ▪ Beneficiary Questions ▪ Premium Collections — In Force Policies ▪ All Billing and Premium Collections ▪ Billing Issues ▪ Timing of Premium Payments for Conversions ▪ Applying Money to Premiums ▪ Conversion Questions 	<p>Policy changes/updates, illustration, NTO requests, ownership changes, POA/guardianships, reinstatement (no UW), reissue (no UW), release of assignment, rewrite (no UW), surrender, third-party authorization, withdrawals: 3-5 business days 1035 exchanges, correspondence/histories: 5-7 business days Duplicate policies, general research: 5-10 business days Premium research: 7-10 business days Custom illustrations: 10-15 business days Policy change, reinstatement, reissue, rewrite (all with UW): 30-60 business days</p>
<p>Traditional New Business</p> <ul style="list-style-type: none"> ▪ Policy Questions ▪ Application Requirements ▪ Policy Errors ▪ Reissue Requests ▪ General Underwriting Questions ▪ Status of Submitted Work 	<p>24 hours response. Some responses may be available from TAN Case Management within 4 hours.</p>
<p>TAN Tech Support</p> <ul style="list-style-type: none"> ▪ Set Up Agent/Producers ▪ Agent Access ▪ General Agent Tech Support ▪ Manages Global Address Book ▪ User Requests/TAANI Logins ▪ Main Account Creation 	<p>Emails: 24-48 hours Phone calls: Same day for response</p>

WHO TO CALL, SLAs CONTINUED

DEPARTMENT/REASON TO CONTACT		SLA TIME
Underwriting <ul style="list-style-type: none"> Reason for Decline Consider Better Offer Foreign Nationals (email inbox) 		2 days for everything — initial reviews and WIP (mail) items
Corrective Processing <ul style="list-style-type: none"> In Force Policy Changes and Reissues for Life Policies 		24-48 hours for response
Policy Reinstatements		24-48 hours for response
Complex Corrections <ul style="list-style-type: none"> Duplicate Policies Post-Issue Research and Inquiries 		24-48 hours for response
Policy Loan and Surrender <ul style="list-style-type: none"> Loans Tax Consequences/1099 Tax Statements Withdrawals/Partial Surrenders Dividends Cancellations/Not Takens/Free Looks VUL Disbursements Surrenders Cost Basis & Form 712 External 1035s 	<ul style="list-style-type: none"> Stop Pays Overloans Maturities Restore General Inquiries Unclaimed Property One-Year Term Insurance Life Admin. Disbursements Dormants Medicare Supplement Disbursements External 1035s 	24-48 hours for response
Beneficiary Title <ul style="list-style-type: none"> SSN and Name Changes Deceased Owners Beneficiary Changes POA/Trusts/Entities Owner & Payor Changes Legal Miscellaneous 	<ul style="list-style-type: none"> Assignments and Releases Third-Party Authorizations Bankruptcy Special Authorizations Address Changes Corporate Resolutions 	24-48 hours for response