



Transamerica Agency Network

Contact sheet



For Agent Use Only. Not for Use With the Public.

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.

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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	imsparmed.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.

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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

magliffe@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_agencyservices@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				
Premium					
<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)</p> <p>3 business days ETA for critical requests</p> <p>Same day for VUL policies</p> <p>5 business days ETA for standard work</p>				
<table border="1"> <tr> <td data-bbox="120 989 776 1073">In Force Policy Illustrations</td> <td data-bbox="776 989 1502 1073">Term quotes - 5 business days; UL and IUL In Force illustrations and ledgers, 10-15 business days</td> </tr> </table>		In Force Policy Illustrations	Term quotes - 5 business days; UL and IUL In Force illustrations and ledgers, 10-15 business days		
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Commissions					
<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</p> <p>2 business days for escalations</p>				
<table border="1"> <tr> <td colspan="2" data-bbox="120 1499 1502 1556">Professional Development</td> </tr> <tr> <td data-bbox="120 1570 776 1879"> <ul style="list-style-type: none"> ▪ Conversion Options ▪ Illustration Support ▪ Quote Support ▪ Product ▪ Questions ▪ Riders and Benefits ▪ Sales Support </td> <td data-bbox="776 1570 1502 1879"> <p>24-48 hours for response time</p> </td> </tr> </table>		Professional Development		<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>
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Who to call, SLAs continued

Department/Reason to contact	SLA time
Contracting & Licensing	
<ul style="list-style-type: none">Contract PaperworkTermination StatusContract StatusTransfer Book of BusinessLack of ProductionAgent HoldsView InformationAgent 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>
In Force Customer Service	
<ul style="list-style-type: none">Non-Escalation IssuesBanking InformationIn Force QuestionsGeneral MaintenanceBeneficiary QuestionsPremium Collections – In Force PoliciesAll Billing and Premium CollectionsBilling IssuesTiming of Premium Payments for ConversionsApplying Money to PremiumsConversion 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>
Traditional New Business	
<ul style="list-style-type: none">Policy QuestionsApplication RequirementsPolicy ErrorsReissue RequestsGeneral Underwriting QuestionsStatus of Submitted Work	<p>24-hour response. Some responses may be available from TAN Case Management within 4 hours.</p>
TAN Tech Support	
<ul style="list-style-type: none">Set Up Agent/ProducersAgent AccessGeneral Agent Tech SupportManages Global Address BookUser Requests/TAANI LoginsMain 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 Stop Pays Overloans Maturities Restore General Inquiries Unclaimed Property One-Year Term Insurance Life Admin. Disbursements Dormants Medicare Supplement Disbursements 	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 Assignments and Releases Third-Party Authorizations Bankruptcy Special Authorizations Address Changes Corporate Resolutions 	24-48 hours for response

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