





# THE NEW FFIUL SELLING EXPERIENCE

MORE CONTROL IN YOUR HANDS

## BOOST HOW YOU SELL

For successful agents in the field, efficiency is the name of the game. That's why we're simplifying your business with a fully digital application and policy eDelivery experience for *Transamerica Financial Foundation IUL*® (FFIUL) on iGO® e-App.

Illustration printing, in-person signing, and mail delays are now a thing of the past. See how our new digital enhancements help you place business faster, no matter how you sell — in person or virtually.

	THE OLD WAY	THE NEW WAY
 <b>Illustrations</b>	<ul style="list-style-type: none"> <li>You were unable to digitally sign illustrations</li> <li>Illustration had to be printed and signed in person by you and your client</li> <li>Signed illustration had to be scanned and uploaded on agent portal after e-App submission</li> </ul>	<ul style="list-style-type: none"> <li>Save illustration PDF and attach it within the iGO e-App</li> <li>You and your client electronically sign the illustration and application in a single process</li> <li>Electronically sign and submit illustration when a revised illustration is needed at policy delivery</li> </ul>
 <b>Outstanding Requirements</b>	Outstanding new business forms were not provided — you had to locate them yourself on the agent portal	Outstanding new business forms delivered to your inbox
 <b>eDelivery</b>	When there were outstanding illustration requirements, the system automatically switched over to policy print and contract mailing	Expanded policy eDelivery availability for faster case placement
 <b>Policy</b>	Multiple illustrations were included and combined with the bound section of the policy	One illustration separate from the bound policy for easier review



TRANSAMERICA®

## YOUR NEW STREAMLINED PROCESS

### Providing an illustration at time of application submission



1. Run illustration in myTransWare<sup>SM\*</sup>



2. Download & save PDF



3. Upload to client's iGO e-App



4. Agent and client sign e-App with illustration

### Providing a **revised** illustration when policy is approved other than applied



1. Run illustration in myTransWare\*. Check **"Revised Illustration"** under options tab



2. Download & save PDF



3. Upload revised illustration to agent portal



4. Client digitally signs with DocuSign during policy eDelivery



### eDELIVERY QUICK TIPS

1. The first time an agent receives an eDelivery notification email, they will be prompted to create a DocFast® account for their Transamerica policies. Note: DocFast is the policy eDelivery platform provided by iPipeline®.
2. All eDelivery email notifications are sent to the policy owner and the agent listed to receive communications.
3. Any required actions within the eDelivery email must be completed by both the agent and owner within 15 calendar days.
4. If the required actions are not completed within 15 calendar days, the policy will be printed and mailed.

### CASES THAT ARE NOT ELIGIBLE FOR eDELIVERY:

- New York, Guam, Puerto Rico, or Virgin Islands
- Non-person owner types, such as organizations and trusts, or multiple owners
- Insured or owner is not a U.S. resident
- Insured is a juvenile
- Insured and/or owner email address is missing
- Insured and/or owner SSN is missing

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\*WinFlex may also be used for new or revised Illustrations

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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