

MAKING BUSINESS EASIER

**TRANSAMERICA SELLING EXPERIENCE:
SAVE TIME WITH DOCUSIGN® AND POLICY eDELIVERY**



eDelivery is the fastest and easiest way to deliver IUL, term, and final expense policies to your clients – all while getting you paid faster.

BENEFITS OF POLICY eDELIVERY

- EASY** ✓ ● ● ● Simple opt-in within the iGO® e-App
- CONVENIENT** ✓ ● ● ● Electronically sign documents 24/7 with DocuSign
- FAST** ✓ ● ● ● Policy documents arrive in your inbox as soon as they're complete
- SECURE** ✓ ● ● ● Fully encrypted technology protects client's personal information
- UP TO DATE** ✓ ● ● ● Know the status of a policy at any time throughout the process
- CONTROL** ✓ ● ● ● Retain the ability to review the policy before sharing with your client

HOW POLICY eDELIVERY WORKS

You and your client will work together to complete these 5 simple steps:

STEPS 3 through 5 must be completed within **20 calendar days** or **the policy will automatically be mailed to them.**

1–20 Calendar Days

YOUR STEPS

CLIENT STEP

- | | | | | |
|-----------------------------------|-----------------------------|--|--|--|
| 1
Opt in through the iGO e-App | 2
Submit the application | 3
Agent and client receive an email to access and review the policy | 4
Create a Transamerica DocFast®* account | 5
Client accepts & signs policy documents in DocuSign |
|-----------------------------------|-----------------------------|--|--|--|

You're notified when the client views and signs their documents.

CONGRATULATIONS!
The final policy is emailed directly to the client.
You'll also receive a copy in your DocFast Dashboard.

* First-time users must create a Transamerica account, even if they already have a DocFast account through another carrier.

QUICK TIPS

FIRST-TIME USERS

You must set up a **TRANSAMERICA DocFast account**. This account will only support Transamerica eDelivery, so other DocFast accounts you have will not work.

Watch for an email from schnbedelivery@transamerica.com to get started.

- Sender will be "New Business"
- Subject line:
Policy [Policy Number] was delivered

Need help setting up your DocFast account?
[Watch this short video.](#)

EXISTING USERS

Want to view the status of a policy or reset your password?

Visit policyexpertnerportal.ipipeline.com to check alerts, policy status, or send client emails.

WHEN IS POLICY eDELIVERY NOT AVAILABLE?

The iGO e-App will automatically alert you when your case is ineligible for eDelivery.

Know in advance what factors will exclude your client from using our eDelivery solution. They include:

- The application state (issue state) is NY, GU, PR, or VI.
- The owner or insured residence state is NY, GU, PR, VI, or any foreign state/country.
- The insured is a juvenile and the owner is not the legal guardian.
- There is a contingent owner.
- The insured and/or owner is not a U.S. citizen.



TRANSAMERICA®

Make more possible.

 Visit: transamerica.com