

# DO MORE IN LESS TIME

## TRANSAMERICA FINAL EXPENSE SOLUTIONS PORTFOLIO QUICK START

### Welcome to a better way to write final expense insurance.

Our new digital experience makes the process faster, easier, and more accurate than ever. It's quicker coverage for your clients, and less time and effort for you. So you can spend more time doing what you do best — selling and earning commissions.

We're committed to inspiring the growth of your business. And our new platform and tools will help you quote, apply, evaluate, submit, track, and manage your business more efficiently.

Here's how to take full advantage of the upcoming benefits:

#### 1. REGISTER AND SIGN IN TO THE NEW MOBILE-FRIENDLY TRANSAMERICA AGENT + ADVISOR EXPERIENCE (AX)

Dive into our new Transamerica Agent + Advisor Experience by logging in to [transamerica.com](http://transamerica.com). First time users need to register with their agent writing number and email account associated with their Transamerica business.



**TIP:** Explore the "Learn" section for our new *Final Expense Solutions Portfolio* agent and consumer materials.

#### 2. RUN A QUOTE FOR YOUR CLIENT

MyTransware® is your exclusive mobile tool for final expense quotes and illustrations. It replaces the legacy mobile quote sites (<http://fe-tpl.mprecalc.com/> and <http://fe-ta.mprecalc.com/>), and its benefits include:

- No additional login requirements
- Fewer required inputs
- Option to save a case
- Two different quote levels:
  - "Summary" for a quick quote with premiums for all payment modes
  - "Illustration" for a print-ready, personalized client illustration you can use at point-of-sale to show premiums, death benefits, cash value, and reduced paid-up options



**TIP:** Access myTransware® from the "Sales Tools" section of the Transamerica Agent + Advisor Experience.

#### 3. APPLY USING iGO e-APP®

Now you can write final expense business electronically with the same iGO e-App you may already know. When you do, you'll get the benefits of *Express Protect Underwriting*™ — placing business faster and getting paid more quickly. Visual cues will guide you through the iGO e-App process, ensuring you'll always submit in good order, with no delays for illegibility, incomplete fields, or wrong forms.



**TIP:** Access iGO e-App from the "Sales Tools" section in the Transamerica Agent + Advisor Experience.

#### 4. EVALUATE THE PROPOSED INSURED

No more guessing on risk class or premiums with the automated *Express Protect Underwriting* tool, which runs in the background on all *Final Expense Solutions Portfolio* iGO e-Apps. After data collection and HIPAA authorization, the iGO e-App returns a risk class recommendation with an associated premium based on height/weight, answers to medical questions, and external data checks. This new experience is designed so you only apply for coverage that your client has the potential to be approved for, reducing hold-ups for “approved other than applied.”



**TIP:** The *Final Expense Solutions Portfolio* uses streamlined, consolidated underwriting guidelines for insureds ages 0 to 85. Learn the latest underwriting guidelines in the Final Expense Agent Product and Underwriting Guide.

#### 5. SUBMIT

After bank account verification, your client e-signs the application. Once you submit, you’ll know whether your case is pre-approved or whether additional underwriting is needed.



**TIP:** The iGO e-App requires electronic signatures.

#### 6. MANAGE CASE REQUIREMENTS ON THE TRANSAMERICA AGENT + ADVISOR EXPERIENCE

Although our *Final Expense Solutions Portfolio* is designed for quick placement, there are times when additional information is needed. You can quickly and easily view your pending business on your dashboard. Filter your case list by product, name, or policy number, and view details.



**TIP:** The new Transamerica Agent +Advisor Experience is the only place you’ll view and manage your pending final expense. You can now upload required documents directly to your case.

#### 7. PLACE THE CASE

Faster case placement is good for you, your clients, and your business. This new experience accelerates the approval process and initial premium collection so clients get covered more quickly and you receive your commission sooner.

#### 8. MANAGE YOUR BOOK OF BUSINESS AND CORRESPONDENCE

Your clients’ protection is at the center of everything you do. The new Transamerica Agent + Advisor Experience makes it easy to see your in force policies, consolidated for all your writing numbers, in one place.



**TIP:** In the "In Force" section, view details within each policy for answers to your clients’ questions about account details, statements, and correspondence — such as billing notices — all in one place.

#### Start today.

Log in to the Transamerica Agent + Advisor Experience.

### We’re here to help you grow.

Contact your sales desk today.



**Visit:** [transamerica.com](https://transamerica.com)



**Call:** Call your sales support team.

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