

ACCELERATE YOUR BUSINESS

TRANSAMERICA FINAL EXPENSE SOLUTIONS PORTFOLIO

Quick decisions and convenient coverage to fuel your business.

Transamerica's *Final Expense Solutions Portfolio* provides your clients hassle-free permanent life insurance protection that will be there when their loved ones need it most.

Our digital tools help you quote, submit, and manage your business all in one place.

Here's how to get started:

1. RUN A QUOTE FOR YOUR CLIENT

Access the quick quote tool at transamerica.com/quote-fe. In just a few steps, quote coverage that fits your client's budget. Best of all, this tool is available without a login on both your phone or desktop.

The tool features two solve options:

- Solve for premium when you know the coverage amount that fits your client's need
- Solve for face amount when you want the death benefit that works within your client's premium budget

2. REGISTER AND SIGN IN TO THE NEW MOBILE-FRIENDLY TRANSAMERICA AGENT + ADVISOR EXPERIENCE

Dive into our new Transamerica Agent + Advisor Experience by logging in to 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.

3. APPLY USING iGO e-APP®

Write final expense business electronically with the same iGO e-App you may already be familiar with. When you do, you'll get the benefits of *Express Protect Underwriting*SM — resulting in shorter cycle time. Best of all, it means getting paid faster. Visual cues highlight required fields, ensuring you'll always submit in good order and avoid common delays with paper applications, such as illegibility, incomplete fields, or wrong forms.

The responsive e-App guides you by aligning risk class options to your client's answers to medical and lifestyle questions.



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

4. EVALUATE THE PROPOSED INSURED

The application and fast data are reviewed real time through *Express Protect Underwriting*.



TIP: The *Final Expense Solutions Portfolio* uses streamlined, consolidated underwriting guidelines for all ages. See the latest underwriting guidelines in the Final Expense Agent Product and Underwriting Guide.



5. DECISION

You'll be notified by email when your case has been approved — often times the same day.

6. MANAGE CASE REQUIREMENTS ON THE AGENT PORTALS

Although our *Final Expense Solutions Portfolio* is designed for quick placement, there are times when additional information is needed for your pending business.



TIP: The new Transamerica Agent + Advisor Experience is the best place to view and manage your pending final expense. You can view your pending business on your dashboard and upload required documents directly to your case.

7. PLACE THE CASE

Faster case placement is good for you, your clients, and your business. The e-App and *Express Protect Underwriting* 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.

Get started today.

Log in to the Transamerica Agent + Advisor Experience at transamerica.com.

We're here to help you grow.



Call: Call your sales support team.

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.

126663R1

© 2020 Transamerica

For Agent Use Only. Not for Public Distribution.



TRANSAMERICA®