



Transamerica Agency Network

Contact sheet



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Intro, tips, and 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 agency coordinators. 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

Transamerica Sales & Service Hub (Single sign-on dashboard for all portals)	salesandservicehub.transamerica.com
TAN Central	transamerica.com/TAN-central

Important phone numbers

Main Call In **410-223-4485**

Claims	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
Repeat this menu	Option 8

Customer Service – FE Express **800-453-1448**

Exton Contact Center **800-523-7900**

Foreign National Hotline **855-712-0561**

LTC Claims **866-745-3545**

Plano Contact Center **800-362-6900**

UFS **800-256-7911, option 1**

Authorized paramed companies

APPS – Portamedic	800-727-2101	appslive.com
Insurance Medical Services, Inc.	877-808-5533	imsparamed.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

Master life contacts continued

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.

Important email addresses

Claims

Monumental Cancer & Health Policies
Monumental Life Policies
Policies starting with 60 through 65
Transamerica

maghealth@transamerica.com
maglife@transamerica.com
lifeproclaims@transamerica.com
taclaims@transamerica.com

Claims Status

Standalone LTC and LTC Riders only
Policies without standalone LTC and LTC Riders

TanClaimsStatus@transamerica.com
customerLTC@transamerica.com

Commissions

commissions@transamerica.com

Contract & Licensing

tpcl@transamerica.com

Conversions and Internal Replacements

Eligibility & illustrations
Attachments and conversion applications

tancasemanagement@transamerica.com
tansalesdesk@transamerica.com
securenbfirms@transamerica.com

Customer Service

FE Express
Medicare Supplement
Monumental Policies
Transamerica

team@mylifeinsurance.transamerica.com
lumico_agency@transamerica.com
mlscdistrictemail@transamerica.com
tli.customer@transamerica.com

iGO® e-App Tech Support

tantechsolutions@transamerica.com

List Bill/Salary Deduction (to obtain List Bill Control Numbers only)

Dynamax, LP95
Lifetime
Term, IUL

mlscdistrictemail@transamerica.com
TLPCRgroup@transamerica.com
afpcrtiigsdprocessor@transamerica.com

New Business

Escalations
Attachments and conversion applications

tancasemanagement@transamerica.com
securenbfirms@transamerica.com

Professional Development – eligibility, Illustrations, product info,
sales ideas, web portals

tansalesdesk@transamerica.com

Underwriting

International
Large Case Unit
Risk Assessments

international@transamerica.com
LCU@transamerica.com
expressquote@transamerica.com

1035 Exchange

Incoming, Internal 1035 Statuses
Presales Assistance

tancasemanagement@transamerica.com
tansalesdesk@transamerica.com

SLA timeframes

SLA timeframes*	Request type
24-48 Hours	▪ Agent tech support ▪ Conversion options ▪ Illustrations ▪ Product information ▪ Quotes ▪ Riders and benefits ▪ TAN case management (general inquiries)
2-3 Business Days	▪ Agent change (in force policies) ▪ Agent contracting requests ▪ Commission escalations ▪ Consider better offer ▪ Foreign nationals (email inbox) ▪ Reason for decline
3-5 Business Days	▪ Address change ▪ Beneficiary change ▪ Billing change ▪ Collateral assignment ▪ Deceased owner change ▪ Illustration (term) ▪ Name change ▪ NTO request ▪ Ownership change ▪ POA/Guardianship ▪ Policy change (no underwriting) ▪ Premium change ▪ Reinstatement (no underwriting) ▪ Reissue (no underwriting) ▪ Release of assignment ▪ Rewrite (no underwriting) ▪ SSN update ▪ Third-party authorization
5-7 Business Days	▪ Agent contact info updates ▪ Agent direct deposit updates ▪ Contracting and licensing (general inquiries) ▪ Commissions (general inquiries) ▪ Correspondence/Histories
5-10 Business Days	▪ Duplicate policies ▪ General research

* Service level agreements are subject to change without notice.

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SLA timeframes continued

SLA timeframes*	Request type
7-10 Business Days	- Premium research 1035X (internal, +UW, NB) 1035X (outgoing)
10-15 Business Days	- Illustration (IUL, UL, VUL, Whole Life) - Loans - Stop pay - Withdrawals/Partial surrenders
15-20 Business Days	Surrenders
30-60 Business Days	- Agent termination requests - Policy change (with underwriting) - Reinstatement (with underwriting) - Reissue (with underwriting) - Rewrite (with underwriting) - Maturity (no underwriting)

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