HERE TO SERVE YOU

GUIDE TO DOING BUSINESS WITH TRANSAMERICA
Thank you for working with us at Transamerica. We know you work hard to serve your clients, and we want you to know we work hard to provide you with the products, tools, service, and technology you need.

To sell the Transamerica Secure Retirement Index® Annuity, agents will need to have a fixed annuity appointment with Transamerica Life Insurance Company (TLIC). For agents properly appointed with Transamerica Life Insurance Company in their resident state, no action is required. Contact the licensing department at Tpcl@transamerica.com to establish a non-resident appointment. If you wish to establish a non-resident appointment, send the request to Contracting and Licensing at Tpcl@transamerica.com for processing.

Agents also are required to complete state specific training to submit business for this product. The training is available on the RegEd.com or WebCE.com websites. Select Transamerica from the carrier list. Once completed, email the completion certificate with your Transamerica identification number on it to Tpcl@transamerica.com or fax it to 888-837-2820. Prior completion certificates may be submitted as well.
Transamerica also requires National Association of Insurance Commissioners (NAIC) product-specific training before submitting business for this product. This free training is offered by Transamerica through the new Learning Management System (LMS) available on TA ANI -> Training and Development -> TAN Training Center. Once in the LMS, access the TA Secure Retirement Index Annuity training course in the catalog. A knowledge assessment at the end of the course must be completed with a passing score to receive credit for the course. There is no certificate for this course.

For status on appointment and product training, email licensing at Tpcl@transamerica.com.

**MARKETING MATERIAL**

Transamerica’s Web Sales and Marketing Tools are available on Transamerica.com and on Crump’s Transamerica Agency Network branded site Tan.crumplifeinsurance.com.

View and download forms and information, including:

- New Business Forms.
- Product Information.
- Marketing Concepts and Sales Materials.

**ILLUSTRATION ACCESS**

The Transamerica Secure Retirement Index® Annuity illustration can be accessed via the Transamerica.com website. Agents will need to enter their username and password.

- Go to Transamerica.com > Financial Professionals > Products > Fixed Index Annuities.
- Log in.
- Click on “Illustrations” under the “Resources” box on the right.
- Click on “Start Now” under “Annuity Illustrations.”
- A new internet window appears.
- Click on “New Illustration” at the upper left corner of the page.
- A micro window appears.
- Choose state.
- Choose “Fixed Indexed Annuity” pertaining to “Product Type.”
- Click on Secure Retirement Index.
SUBMITTING APPLICATIONS

The Transamerica Secure Retirement Index® Annuity product is available for electronic submission by accessing Crump’s website.

- The application must be completed as well as the suitability questionnaire.
- Transamerica Life Insurance Company will be doing the suitability review for this product.

FOR ELECTRONIC APPLICATIONS

- Go to Transamerica.com > Financial Professionals > Products > Fixed Index Annuities.
- Log in.
- Hover mouse pointer over “My Account” at the top.
- Click on “Order Entry” that appears on the left.
- A new internet window appears.
- Click on “New Application.”
- Select state under “Select Jurisdiction.”
- Select Fixed Index Annuity under “Product Type.”
- Click on Secure Retirement Index.

MONITORING YOUR NEW BUSINESS

You can monitor your new business via the Crump web site under Case Status. You may also contact Crump’s New Business team at 877-502-3062, option 3, then option 2.

MONITORING YOUR IN FORCE BUSINESS

You can monitor your in force business via Transamerica.com, 24 hours a day, 7 days a week. You can also contact our Customer Care Group for any questions.

- For Post-Issue questions call: 800-851-7555.
- Client questions call: 800-797-2643.
WEBSITE NAVIGATION TO “BOOK OF BUSINESS”

- Hover mouse pointer over “My Account” at the top.
- Click on “Book of Business” on the left.
- Policies will appear (may appear on multiple screens due to higher number of policies).
- Click on the policy number to view the individual policy information.

WEBSITE NAVIGATION TO “BOOK OF STATEMENTS”

- Hover mouse pointer over “My Account” at the top.
- Click on “Book of Statements” on the left.
- Advisor/agent can print individual statements or the entire set of statements from here.
Annuities issued by Transamerica Life Insurance Company, Cedar Rapids, IA.

For agent use only. Not for use with the public.

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