

CONTACT SHEET

iGROUP

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TRANSAMERICA®



INTRO, TIPS, & TRICKS

Working with multiple carriers and managing all your contacts can get complicated.

That's why we've prepared an easy-to-navigate contact sheet for our valued agents and firms. 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 (Account Managers or Sales Partners being the exceptions). 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.

MASTER LIFE CONTACTS

WEB PORTALS	
agentnetinfo.com	
transamerica.com	
IMPORTANT PHONE NUMBERS	
Toll-Free Number to Call	877-234-4848
Underwriting & New Business Questions – Life, Final Expense	Option #1
Commissions	Option #2
Contract & Licensing	Option #3
Policyholder Customer Service/Claims	Option #4
Sales Desk/Product Support	866-545-9058
iGO e-App support prior to case submission	866-303-7833
Sales Office Technical Support (SOTS)	866-303-7833
Technical Support at iPipeline®	800-641-6557
AUTHORIZED PARAMED COMPANIES	
APPS-Portamedic, appslive.com	800-727-2101
Exam One Inc., examone.com	800-768-2056
Superior Mobile Medics, smminsurace.com	800-898-3926
Examination Management Services, Inc., eol6.emsinet.com	800-872-3674
Insurance Medical Services, Inc., imsparmed.com	877-808-5533
IMPORTANT FAX NUMBERS	
New Business/Reissues	866-297-3607
Conversions/Rewrites – Life Only	800-238-4302
In Force Customer Service	866-622-5051
Contract & Licensing	888-837-2820
DIVISION PHONE NUMBERS	
Annuities (General Customer Service)	800-797-2643
Mutual Funds	888-233-4339
Employee Benefits	866-411-4159
Retirement	800-211-8491
MAILING ADDRESS	
Billing, Mail Premium, & Overnight Requirements	6400 C Street SW Cedar Rapids, IA 52499

MASTER LIFE CONTACTS CONTINUED

IMPORTANT EMAIL ADDRESSES	
Life Sales Desk	lifesales@transamerica.com
iGO e-App® Tech Support (Prior to app submission to Trans)	igosupport@ipipeline.com
New Business – Term, IUL	life.marketsnewbusiness@transamerica.com
New Business – Final Expense & <i>Transamerica Lifetime</i> ®	finalexpensenewbus@transamerica.com
Attachments Only - New business. *Body of email will NOT be read - include policy number in subject line.	ecurenbforms@transamerica.com
Attachments Only – In Force for 8-digit policy numbers starting with 0, 4, and 9; 9-digit policies starting with 6600. *Body of email will NOT be read-include policy number in subject line.	interimcsforward@transamerica.com
Attachments Only – In Force for 9-digit policy numbers starting with 011, 012, 013, 014, 015, 016, 8, LFC, FEX, etc. *Body of email will NOT be read - include policy number in subject line.	afpcrcustomerservice@aegonusa.com
New Business – Escalations Emails received prior to 3 p.m. CST will get same day response.	TANBEscalations@transamerica.com
International Underwriting Quick Quotes	international@transamerica.com
Contract & Licensing - Life	tlp-crcontractadmin@transamerica.com
Commissions	commissions@transamerica.com
In Force Customer Service Inquiries	tii.customerservice@transamerica.com
In Force Customer Service Inquiries for Policies Starting with “60”-“65”	Life.CustomerService@transamerica.com
In Force Policy Change Inquiries and Reissues for Life Insurance Policies	tii.customerservice@transamerica.com
Policy Reinstatements	tlptcsreinstatement@transamerica.com
Duplicate policies and complex post-issue corrections, research, and inquiries	afpcrtranscomcorr@transamerica.com
Conversions to IUL & Internal Replacements - For initial questions about eligibility or to run illustrations please contact the Sales Desk	Eligibility: tii.customerservice@transamerica.com Processing: conversionsandinternals@transamerica.com
Conversions to Whole Life & Internal Replacements - For initial questions about eligibility or to run illustrations please contact the Sales Desk	Eligibility: tii.customerservice@transamerica.com Processing: conversionsandinternals@transamerica.com
Claims	bkgclaimsstatus@transamerica.com
Claims for Policies Starting with “60”-“65”	lifeproclaims@transamerica.com
Customer Service – Beneficiary and Title	afpcrtranscontserv@transamerica.com
Customer Service – Policy loan, surrender, withdrawal, free look, and 1035 exchanges	afpcrtranspolloansurr@transamerica.com
Customer Service – Premium Collections	afpcrtransprecoll@transamerica.com
Agent Portal Technical Support and Sales Office Technical Support (SOTS)	Salesoffice-support@transamerica.com
iPipeline Technical Support (iGO)	igosupport@ipipeline.com
Underwriting Support - Used for APS fee approval, requesting copies of labs and exams, getting information to an UW working a case	professionalrelations@transamerica.com

WHO TO CALL, SLAs

DEPARTMENT/REASON TO CONTACT		SLA TIME
Premium - Premium Collections (In Force Policies) - Billing/Billing Issues - Timing of Premium Payments for Conversions - Applying Money to Premiums - Group Payroll - Salary Deduction - Waiver of Premium	- CSFL Individual Billing - Queues Billing & SSBO - Speedpay - Overdrafts - TEFRA/TAMRA - Banking & Credit Card Updates - Shortages & Grace Period - Returns - Checks, PAC, Credit Card - Payments - Lockbox, Checks, Wires	24-hour (automated response) 3 business days ETA for critical requests Same day for VUL policies 5 business days ETA for standard work
In Force Policy Illustrations		5 days for general inquiries 2 days for escalations@ipipeline.com
Commissions - General Questions, Billing, Billing Issues - Change of Servicing Agent - Off Cycle - Commission Requests - Statements - History - Chargeback Rules - Advances		5 business days for general inquiries 2 business days for escalations
Sales Desk - Conversions - Illustrations - Quotes - Product - Questions - Riders and Benefits - Questions		24-48 hours for response time. Please request specific processing SLA time from your contact.

WHO TO CALL, SLAs CONTINUED

DEPARTMENT/REASON TO CONTACT	SLA TIME
Contracting & Licensing - Contract Paperwork - Termination Status - Contract Status - Contract Paperwork - Transfer Book of Business - Lack of Production - Agent Holds - View Information - GA Mass Transfer From One IMO to Another	Appt requests: 2-3 business days Contact info update: 5-6 business days Direct deposit update: 5-6 business days General inquiries: 5-6 business days Termination requests: 30-31 business days Agent change on in force policy: 2-3 business days
Contact Center - Non-Escalation Issues - Banking Information - In Force Questions - General Maintenance - Beneficiary Questions - Premium Collections – In Force Policies - All Billing and Premium Collections - Billing Issues - Timing of Premium Payments for Conversions - Applying Money to Premiums - Conversion Questions	Policy changes/updates, illustration, NTO requests, ownership changes, POA/guardianships, reinstatement (no UW), reissue (no UW), release of assignment, rewrite (no UW), surrender, third-party authorization, withdrawals: 3-5 business days; 1035 exchanges, correspondence/histories: 5-7 business days Duplicate policies, general research: 5-10 business days Premium research: 7-10 business days Custom illustrations: 10-15 business days Policy change, reinstatement, reissue, rewrite (all with UW): 30-60 business days
Traditional New Business - Policy Questions - Application Requirements - Policy Errors - Reissue Requests - General Underwriting Questions - Status of Submitted Work	24-48 hours for response. Please request specific processing SLA time from your contact.
SOTS - Set Up GA/Producers - GA Access - General GA Tech Support - Manages Global Address Book - User Requests/TransAct Logins - Main Account Creation	Emails: 24-48 hours Phone calls: Same day for response

WHO TO CALL, SLAs CONTINUED

DEPARTMENT/REASON TO CONTACT	SLA TIME
LifePro - Illustration Issues - Life Pro Conversions - Owner and Beneficiary Changes - Custom Illustrations	Surrender requests, cancels, not takers, complaints, conversions, loans, withdrawals, NFO, tax requests: 10-15 business days Reinstatement requests, reissues, rewrites, complex research, complex correspondence, any work requiring UW, 1035 exchanges: 15-30 business days Billing/PAC changes, approved rush requests: 3-5 business days Beneficiary and ownership changes, loan histories, premium histories, duplicate policies, ownership changes, beneficiary changes, name change, SSN updates, deceased ownership change, collateral assignment, release of assignment, POA/guardianship, third-party authorization, stop pays, bank statement review, address changes, entity and trust updates: 7-10 business days Illustration requests: 20-30 business days
Underwriting - Reason for Decline - Consider Better Offer - Foreign Nationals (email inbox)	2 days for everything - initial reviews and WIP (mail) items
Corrective Processing In Force Policy Changes and Reissues for Life Policies	24-48 hours for response. Please request specific processing SLA time from your contact.
Policy Reinstatements	24-48 hours for response. Please request specific processing SLA time from your contact.
Complex Corrections - Duplicate Policies - Post-Issue Research and Inquiries	24-48 hours for response. Please request specific processing SLA time from your contact.

WHO TO CALL, SLAs CONTINUED

DEPARTMENT/REASON TO CONTACT		SLA TIME
Policy Loan and Surrender - Loans Tax - Consequences/1099 Tax Statements - Withdrawals/Partial Surrenders - Dividends - Cancellations/Not Taken/Freelooks - VUL Disbursements - Surrenders - Cost Basis & Form 712 - External 1035s	- Stop Pays - Overloans - Maturities - Restore - General Inquiries - Unclaimed Property - One-Year Term Insurance - Life Admin. Disbursements - Dormants - Medicare Supplement Disbursements - External 1035s	24–48 hours for response. Please request specific processing SLA time from your contact.
Beneficiary Title - SSN and Name Changes - Deceased Owners - Beneficiary Changes - POA/Trusts/Entities - Owner & Payor Changes - Legal Miscellaneous	- Assignments and Releases Third-Party Authorizations - Bankruptcy - Special Authorizations - Address Changes - Corporate Resolutions	24–48 hours for response. Please request specific processing SLA time from your contact.