




TransACT® Enhancements

Delivery Requirement Enhancements & Policy Amendments Now Online!

We are pleased to announce a number of enhancements that will make it easier for you to check the status of a policy's delivery requirements and view and print policy amendments.

New Policy Delivery Requirements Page

For all policies with Delivery Requirements, a new policy Delivery Requirements page will immediately follow the policy invoice. This new page lists each of the Delivery Requirements for that policy. Please see a sample of both the revised policy invoice and the new policy Delivery Requirements page below.

 **TRANSAMERICA**

OUTSTANDING REQUIREMENTS

Below is a list of outstanding requirements that need to be completed in order to activate the enclosed policy. To avoid delays in activating the enclosed policy, Transamerica must receive all items no later than **XXX XX, XXXX**.

POLICY DELIVERY RECEIPT

Please have the Policy Owner and Producer sign and date the Company's Copy. The Policy Owner's copy should be retained by the Policy Owner and immediately return the Company's Copy to Transamerica.

PREMIUM DUE CARRIER

Premium Amount Due: \$XXX.XX

The initial premium must be paid in order for the enclosed policy to be activated. Payment is payable to Transamerica in the amount referenced above.

BANK DRAFT AUTHORIZATION CARD (BANK INFORMATION)

If premiums are to be deducted directly from a checking account please have the account complete and sign the Pre-Authorized Check/Withdrawal Plan Form and return it to Transamerica. If the Owner of the policy is not the Depositor of the account, then the Owner must also sign.

AMENDMENT

The enclosed Application Amendment must be signed by the Policy Owner in order for the enclosed policy to be activated. If a signature line for the proposed insured is included on this form, please ensure it is signed by the insured if different than the owner. If the owner and the insured are one in the same, the Policy Owner will sign as both the owner and insured. After signing the Amendment, please return it to Transamerica. A second copy of this Amendment can be found within the policy contract. This copy should be signed and retained by the Policy Owner.


SAVE AGE AMENDMENT

The enclosed Application Amendment must be signed by the Policy Owner in order for the enclosed policy to be activated. If there are multiple Policy Owners, all owners must sign. If a signature line for the proposed insured is included on this form, please ensure it is signed by the insured if different than the owner. If the owner and the insured are one in the same, the Policy Owner will sign as both the owner and insured. After signing the Amendment, please return it to Transamerica. A second copy of this Amendment can be found within the policy contract. This copy should be signed and retained by the Policy Owner.

VOID CHECK

Please send a voided check from the checking account of the premium payor. Deposit slips are not accepted and starter checks cannot be used.

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 **TRANSAMERICA**

REVISED DELIVERY REQUIREMENTS SECTION OF POLICY INVOICE

DELIVERY REQUIREMENTS

- DO NOT DELIVER BEFORE
- SIGNED AMENDMENT
- SIGNED APPLICATION
- "CLEAR" HEALTH FORM
- DELIVER ONLY ONE POLICY - RETURN THE OTHERS!
- RETURN POLICY NO.
- SEE MEMO **See 2nd page for Requirements**

The revised Delivery Requirements section of the policy invoice will look like the sample above. No other changes to the policy invoice have been made.

Page 1

Page 2

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EBM 549 0710



Transamerica Life Insurance Company
Transamerica Financial Life Insurance Company

AEGON companies



TransACT® Enhancements

Enhancements to the Pending Section on TransACT®

New Delivery Requirements Section

Now it's easier to access and check the status of a policy's delivery requirements on TransACT®. Note that the Delivery Requirements section will only appear if New Business has created a Delivery Requirement.

- The new Delivery Requirements section follows the Underwriting Requirements section on the Pending Policy Detail page.
- The format of the Delivery Requirements section now matches the format of the Underwriting Requirements. For each delivery requirement, you'll be able to view the type, who it's for, the date it was ordered and received, comments and current status. Outstanding delivery requirements will be shown in red text.
- If there are special instructions for a policy, a new Special Instructions section will immediately follow the Delivery Requirements section.
- Agency Management System customers will be able to view Delivery Requirements as requirements delivered within the pending file extracts.



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Rapid Review | FastStart | Underwriting Requirements | **Pending Status**

Home > New Business > Pending Status > Lookup

Pending Status - Detail

Print

Insured: [] **Date of Birth:** Jan 01 1965 **U/W Initials:** XX

Address: 123 []

Policy Number: [] **Agent:** HOME OFFICE

Underwriting Requirements (Explanation of Codes)

Requirement	For	Ordered	Received	Comments (Abbreviations)	Status
Consent for AIDS-Related Blood Testing - 1	IN	Feb 05 2010	Feb 05 2010		Matched
Perform Examination By Paramed - 1	IN	Feb 05 2010	Feb 05 2010		Waived
Abbreviated Blood Chemistry - 1	IN	Feb 05 2010	Feb 05 2010		Waived
HIPAA Authorization - 1	IN	Feb 05 2010	Feb 05 2010		Waived
Illustration - 2	IN	Feb 08 2010	Feb 08 2010		Matched

Delivery Requirements (Explanation of Codes)

To view or print a requirement document created by New Business, click on the Adobe PDF Icon for that requirement.

Requirement	For	Ordered	Received	Comments (Abbreviations)	Status
Do Not Deliver Before - 2	IN	Feb 05 2010		03/10/2009	Ordered By Home Office
Deliver Policy and Return/Destroy Other - 2	IN	Feb 05 2010		DELIVER 49015442 AND DESTROY 42568971	Ordered By Home Office
Return Original Policy - 2	IN	Feb 05 2010		RETURN 65123564	Ordered By Home Office
Non Self Health APE-1	IN	Feb 05 2010		NON SELF HEALTH APE-1	Ordered By Home Office
Self Health APE-2	IN	Feb 08 2010		SELF HEALTH APE-2	Ordered By Home Office
Save Age APE-3	IN	Feb 09 2010		SAVE AGE APE-3	Ordered By Home Office
\$1,040.00 *PAYS TO: FEB 01 2011	IN	Feb 09 2010			Ordered By Home Office
Bank Draft Authorization Card (Bank Information)	IN	Feb 10 2010			Ordered By Home Office
Void Check - (need voided check from client) - 1	IN	Feb 10 2010			Ordered By Home Office
Do Not Deliver Before - 1	IN	Feb 05 2010	Feb 05 2010	03/10/2010	Matched
Return Original Policy - 1	IN	Feb 05 2010	Feb 05 2010	RETURN 60152438	Matched
Deliver Policy and Return/Destroy Other - 1	IN	Feb 05 2010	Feb 05 2010	DELIVER 49015442 AND RETURN/DESTROY 49015441	Matched
Illustration - 1	IN	Feb 05 2010	Feb 05 2010		Matched
Illustration - 3	IN	Feb 08 2010	Feb 09 2010		Matched
	IN	Feb 09 2010	Feb 09 2010		Matched
	IN	Feb 09 2010	Feb 09 2010		Matched

Special Instructions

[]

Basic Information

Policy Status	Issued	Last Activity Date/Time	Jun 23 2010
U/W Action	Approved as Applied for	Received Date	Feb 01 2010
Issue Action	POLICY MAILED	U/W Action Date	Feb 08 2010
Application Type	Submitted Application	Issued Date	Feb 09 2010
Operation Type	New Business	Mailed Date	Apr 06 2010
		Compliance Letter Mailed Date	

New location on the page—if a policy has delivery requirements, the section will appear here.

If a policy has special instructions, the section will appear here.

Now more detail about each delivery requirement.



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