

A person wearing a red jacket and a red and white knit hat is sitting on a large, dark log in a lush green forest. Their arms are raised in the air, and they are looking away from the camera towards the trees. The background is filled with dense green foliage and a soft, hazy light, suggesting a sunrise or sunset.

YOUR GUIDE TO THE AGENT + ADVISOR EXPERIENCE

AT [TRANSAMERICA.COM](https://transamerica.com)

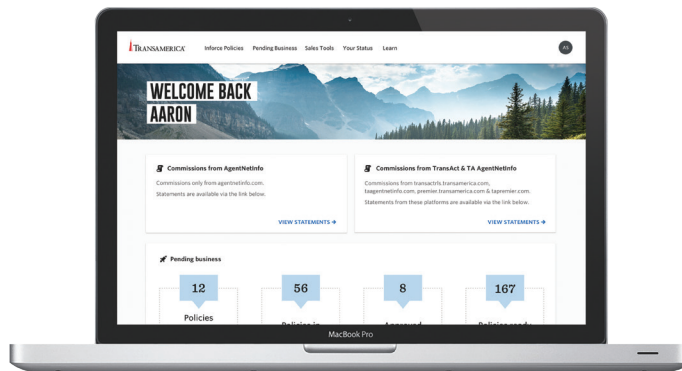


TRANSAMERICA®

You told us you want to work with a company that makes it easy to manage your business. That's why we built the Agent + Advisor Experience, an all-new platform for you to access Transamerica products.

Agent + Advisor Experience =





NEW WEBSITE, NEW LOG IN

The first time you log in to the AX, please create a new username and password. We understand no one wants another password to remember, but the AX will help ensure a more secure and integrated experience. Over time, this will become the only username and password you will need for Transamerica business. The old websites will remain available as you become familiar with the AX.

WHAT YOU'LL NEED

- Your agent or advisor number
- Access to the email associated with your current Transamerica account
- Your computer or device — tablets and phones welcome!
- For the best experience, use Chrome, Firefox, or Safari

CREATE YOUR USERNAME AND PASSWORD

Your AX username and password won't change or replace those you use on other Transamerica websites.

RETURN USERS

Go to transamerica.com. Click the  button. Follow the instructions to log in with your AX username and password.

REGISTER NOW



1. Go to transamerica.com/AX
2. Click 
3. Follow these five steps to create your secure account:

- Enter your name and agent or advisor number (enter the full number in all caps, with leading zeros, if applicable.)
- Create a username and password. Select a primary email address that you currently have access to.
- Validate your email. You will receive a security code in your email. Enter it on this page.

Security code

8888 -

- Answer three security questions. You may enter an alternate email address on this page, but **please note the alternate email address will be used for all security validation codes and account alerts.**
- Agree to the terms and conditions, and then click 

Website Technical Support

Monday through Friday, 8:30 a.m. – 7:30 p.m. ET



CALL
866-301-2473



EMAIL
asupport@transamerica.com

WELCOME TO AN INTEGRATED BUSINESS EXPERIENCE



Use the Transamerica Agent + Advisor Experience to access tools, resources, and solutions that make doing business easy at your desk or on the go. These features are available now:



MANAGE YOUR ENTIRE BOOK OF BUSINESS

Life insurance policies are available now, and additional products will be added soon. Search, filter, and view policies all in one place. High-level overviews will help you spot trends in your business. Answer your clients' policy questions, view account details, statements, and correspondences, such as billing notices.



EASY ACCESS TO SALES TOOLS

Life insurance illustrations on myTransWareSM, iGO e-App[®], and customer forms are at your fingertips.



PENDING POLICY STATUS

Instantly see the status of all new applications you've submitted in one place. Upload requirements directly to each case. Track policies to be delivered.



ALL NEW LICENSING AND APPOINTMENT STATUS VIEW

Save time with on-demand reports of your appointments, contracts, and licensing status. No more phone calls, no more waiting.

The Agent + Advisor Experience does not yet include every feature available in the websites you have been using. We focused on building the top features used to help clients first. We chose to release the new AX without every feature so you can get to know it and tell us your thoughts — this allows us to build the best business tools possible.

AGENT + ADVISOR EXPERIENCE COMPARISON GUIDE

Details of the AX features can be found under the AX Release 1 column. Where there are no black dots, you can rest assured we'll be adding these features in later releases. You can continue to use existing product websites (in some cases you may have to) as we continue to improve and add features to the AX. Stay tuned!

	AX	LEGACY WEBSITES			
FEATURES	RELEASE 1	TRANSACTION	TRANSAMERICA PREMIER LIFE	TRANSAMERICA FINANCIAL LIFE	LEARNING CENTER
AGENT DEMOGRAPHICS INFORMATION					
Name, Address, Agent ID, CRD#	●	●	●	●	
List of Advisor Numbers	●				
Username & Password Reset	●	●	●	●	
YOUR DASHBOARD					
Pending Policy Dashboard	●				
Sales Support Maps		●			
My Status / Contracting & Licensing Map	●				
Recommended Reading					
Team View					
Reporting		●	●	●	
YOUR IN FORCE POLICIES / BOOK OF BUSINESS					
Client Search	●	●	●	●	
Policy List (Full Book of Business) Filter & Export	●	<i>TLIC Only</i>	<i>TP LIC Only</i>	<i>TFLIC Only</i>	
Policy List, Filter, & Export	●				
Policy Details	●	●	●	●	
Upload Documents	●	●	●	●	
Transamerica Correspondence to Clients	●	●	●	●	
Team View					
Advance Commission (Release 1)	●	●	●	●	
YOUR PENDING POLICIES					
Client Search	●	●	●	●	
Policy List (Full Book of Business)	●	<i>TLIC Only</i>	<i>TP LIC Only</i>	<i>TFLIC Only</i>	
Policy List (Full Book of Business) Filter & Export	●				
Policy Details	●	●	●	●	
Upload Documents	●	●	●	●	
Team View					
PRODUCT LITERATURE AND THOUGHT LEADERSHIP					
Product Details	●	●	●	●	●
Product Training		●	●	●	●
Thought Leadership Content					●
Agent Recognition Reporting		●	●	●	
YOUR STATUS / LICENSING & APPOINTMENTS					
Search	●				
Licensing & Appointment List	●		●	●	
List, Filter, & Export	●				
Licensing & Appointment Dashboard	●				
Upload Documents	●				
ONE-CLICK SALES TOOLS					
Insurance Illustrations (Single Click to myTransWare SM)	●	●	●	●	
Insurance Applications (Single Click to iGo [®])	●	●	●	●	
Wealth Management (Single Click to Salesforce)	●				
Forms (Single Click to Transamerica Forms)	●	●	●	●	

WITH PROGRESS COMES CHANGE



Here are a few things you should know as we grow together:

WHERE CAN I FIND PENDING POLICIES?

Browse, filter, and service all of your pending policies from the dashboard or click Pending Policies on the main menu.

Commission details and production reports are currently only available through the old websites. These are two high priority items we have identified for future releases of the AX. We will continue to develop and release new features based on what's most important to you.

HOW LONG CAN I USE EXISTING WEBSITES?

Starting November 2019, all life insurance business will be managed on the AX. As more features become available in the AX, we plan to remove the old sites. Eventually, the AX will be the single place for all your Transamerica product needs. We will let you know as we get closer to closing the old sites.

CAN I STILL USE EXISTING WEBSITES FOR CERTAIN TASKS?

We have built the AX to make it easier to do business with Transamerica and we would encourage you to use the new AX as often as possible. If there is a feature that doesn't meet your need or has yet to be rolled into the AX, please know that you can continue to use the old sites with your existing username and password.

HOW DO I GET BACK TO THE EXISTING WEBSITES?

In the right hand corner of the dashboard, click View List to see a list of existing websites.

WHERE CAN I ORDER MATERIALS?

Right now you can continue to use existing websites to order print materials. In a later release, we will add direct access from the AX to a new print portal where you can add items to your cart and checkout.

WHERE CAN I SHARE MY FEEDBACK?

Join the Transamerica Influencer Team to speak your mind on how we can make the Agent + Advisor Experience a convenient and efficient tool to manage and help build your business. Sign up at surveymonkey.com/r/M9MW39K.

IF I NEED HELP WITH THE AX, WHO CAN I CONTACT?

The Transamerica Technical Support Team is available over the phone at 866-301-2473 or by email at asupport@transamerica.com.



TRANSAMERICA®

Get started today.

Please create a new account the first time you log in.

 **Visit:** transamerica.com

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