

FAST FORWARD WITH TERM eDELIVERY



We're broadening eDelivery availability and streamlining the process to make it easier for you to do business. Discover all the benefits and get started today.

CHOICE

- Clients have more opportunities to opt in to electronic policy delivery
- Supports virtual selling and buying

SPEED AND CONVENIENCE

- Eliminates traditional printing and mailing
- Saves time scheduling and hosting delivery meetings; obtaining signatures on delivery requirements
- Faster coverage for your clients and less time and energy for you to place policies

SIMPLICITY

- Opt in with iGO e-App® or with consent forms for paper applications
- Get digital access to policy for easy electronic storage

TRANSPARENCY

- Enhanced agent notification and access to eDelivered policies

EXPANDED DIGITAL DELIVERY

- *Trendsetter® Super and Trendsetter® LB*
- All risk classes
- All riders available, including living benefits
- Policies with the following requirements* now eligible:
 - Amendments (NEW)
 - Amendment Statement of Good Health (NEW)
 - Amendment Aviation Exclusion Rider (NEW)
 - Void Check (NEW)
 - eDelivery Terms and Conditions (NEW)
 - Consent to do Business Electronically (NEW)
 - Amendment to Save Age
 - Premium Due
 - EFT Form
 - Policy Delivery Receipt
- Enhanced agent/case manager communication and policy access
 - Notified when policy is eDelivered to client
 - Access to view, download, and print policy via DocFast®

CASES THAT ARE NOT ELIGIBLE FOR eDELIVERY

- New York, Guam, Puerto Rico, or Virgin Islands**
- Non-person owner types, such as organizations and trusts, or multiple owners
- Insured or owner is not a U.S. resident or U.S. citizen
- Insured is a juvenile
- The payor is other than insured or owner and the EFT Delivery requirement is present
- Insured and/or owner email address is missing
- Insured and/or owner SSN is missing



* Re-issues and pre-issue requirements that are granted an exception to obtain on delivery are ineligible for eDelivery.

** *Trendsetter Super* and *Trendsetter LB* not available for sale in New York, Puerto Rico, and Virgin Islands. *Trendsetter LB* not available for sale in Guam. Not available in Maryland when the policy is approved less than applied with sub-standard risk class.

HOW IT WORKS

- **eDelivery opt in**

- iGO e-App: opt in for eDelivery and complete autopopulated consent screens
- Paper Apps: submit two required forms



1. Consent to do Business Electronically and Electronic Delivery of and/or Access to Policy Documents ECONS2017



2. eDelivery Terms and Conditions of Use EINFOC0716*

- **eDelivery Policy Placement**

- Check your agent portal to view policy owner's email and delivery method
- All eDelivery email notifications sent to client and agent/case manager:
 - Owner will receive link via email (valid for 15 days)
 - Email reminders to e-sign documents sent every seven days until link expires
 - If link isn't used within 15 days, the policy will be printed and mailed
- Your client will click on link and enter last 4 digits of Social Security number to view policy
 - If there are no delivery requirements, your client will click "Policy Accepted"
 - If there are delivery requirements, your client will view requirements and e-sign via DocuSign
- You can access DocFast® to review and download a PDF of your client's policy
 - First-time agents must create DocFast® account and password via email link provided in initial email notification
 - Agents with DocFast® account can visit policyexpartnerportal.ipipeline.com to log in and view their dashboard

Help put your business in the fast lane with eDelivery today.

Any questions? Just call your sales desk.

* eDelivery Terms and Conditions of Use form EINFOC0716 not required for Georgia or Utah
Life insurance products issued by Transamerica Life Insurance Company, Cedar Rapids, Iowa.
Not all products available in all jurisdictions.

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