

# TEMPORARY POLICY MAILING PROCESS

## PROCESS & FAQs

Many areas across the country are under state and federal stay-at-home orders, and this has affected how you interact with customers. To help fill a gap in the new business process, Transamerica will begin sending policies directly to our customers. This will be a temporary adjustment, because we know how important it is for you to have a face-to-face conversation with customers. Start dates for the new process vary by product: Trendsetter Products, April 8, all other life insurance products, April 17.

We will continue to update our processes in order to accommodate for the rapidly changing situation. Updates and changes will be published on the Transamerica COVID-19 landing page. [Click here to review](#)

### Policy Delivery Process Methods

- **Regular Mail**  
When the policy is mailed to the client they will also receive a stamped postage envelope. Once the client signs all the delivery requirements, they will place the documents in the provided envelope and mail back to Transamerica. Processing Time - Regular mailing time + 24-48hrs once received by Transamerica.
- **Upload directly to case**  
Once the agent receives the delivery requirements signed back from the client they can log in to the web portal to upload these documents.
- **Secured Portal Link**  
The agent also has the option to contact the client and walk them through on how to upload their delivery requirements to the secured portal link. The client will go to the following link, **[transamerica.com/lp/upload](https://transamerica.com/lp/upload) (this link is for use by clients ONLY)**. The client will complete a quick form and registration process. There are step-by-step instructions to follow and an FAQ section online if customers need help. Processing Time – Takes 24-48hrs for documents to be printed and scanned into the Transamerica system + an additional 24-48rs for Transamerica to process documents.

### Policy Delivery Frequently Asked Questions

**Q:** How will an agent be notified that the policy has been mailed to the policy owner?

**A:** The agent will receive a system generated email informing them that the policy has been mailed and it will include the delivery requirements needed.

**Q:** Where are the delivery requirements found in the policy packet?

**A:** The policy owner will find the delivery requirements in the Financial Professional Information section. They will need to review the forms with their agent, sign them and then return them to Transamerica. Transamerica will provide a postage paid envelope.



**Q:** How will the agent review the policy with the policy owner?

**A:** We recommend using a video chat technology, i.e. Facetime or Zoom, to review the policy.

**Q:** How does the insured return the delivery requirements to Transamerica?

**A:** The preferred method is that the policy owner mail the delivery requirements directly to Transamerica in the provided postage paid envelope. If the policy owner has concerns with mailing the requirements, they can take a picture and upload them through our secure site - [transamerica.com/lp/upload](https://transamerica.com/lp/upload) **(this link is for use by clients ONLY)**.

**Q:** How will the insured/owner return delivery requirements if they do not have a scanner or fax machine?

**A:** If the policy owner has concerns with mailing the requirement they can take a picture of them and upload through a secure FTP site - [transamerica.com/lp/upload](https://transamerica.com/lp/upload) **(this link is for use by clients ONLY)**.

**Q:** What is the process for policies that have been delivered to the agent's business address and the agent does not have access to retrieve the policy from their office?

**A:** Agents can call New Business to request that the policy be mailed to the policy owner's residential address.

**Q:** If the owner and insured are different, to whom is the policy mailed? How do both parties sign?

**A:** Policies are always mailed to the Owner. Only the owner needs to sign for the policy.

**Q:** Does the agent have to sign the delivery requirements?

**A:** During the current COVID-19 pandemic, Transamerica is temporarily waiving the need for an agent signature on delivery requirements.

**Q:** Will Transamerica still require the witness signature on the Statement of Good Health?

**A:** No, we are currently waiving the requirement for a witness signature

**Q:** Can a copy of the policy be mailed directly to the agent?

**A:** No. Currently, we are only sending the policy to the policy owner.

**Q:** Can a policy be e-delivered?

**A:** In most cases, if the application was submitted via iGO for non-med point of sale, and e-delivery was selected, then it will be delivered electronically. Keep in mind, some forms in the policy packet may prevent e-delivery and will be switched and mailed directly to the policy owner. For example, if a statement of good health is needed, it will be mailed directly to the policy owner?

Life Insurance Products are issued by: Transamerica Premier Life Insurance Company, Cedar Rapids, IA, Transamerica Life Insurance Company, Cedar Rapids, IA, Transamerica Financial Life Insurance Company, Harrison, NY.

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