



FASTER CLIENT UPDATES



Streamline Your Business

Get real-time client updates to better manage your business. Effective August 1, 2023, your Customer Activity Report for in force policies (formerly paper) will be delivered electronically twice a week to your inbox for more convenience and security.

Customer Activity Report Delivered Via Email

Fast & Informative

- Receive the same in force reports on Tuesdays and Thursdays without shipping delays or complications
- Receive important information digitally at your fingertips so you can act faster

Safe & Flexible

- Access the in force report on mobile or desktop, at your convenience, anywhere in the world
- Sensitive client information will be protected and sent securely via Zix™

Convenient Coverage Review

- Making updates to existing coverage presents a great time to evaluate life events and whether a client's life insurance coverage should be modified for a better fit



RESOURCES AND CONTACTS

Spend less time updating and servicing policies and more time building your business with our helpful reference form.

[GET GUIDE](#)

ZIX HOW-TO GUIDE

Learn how to receive a Zix secure email from Transamerica.

[GET GUIDE](#)



Any questions?
Please call your sales desk.

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