

# WINNING BY DESIGN

## TRANSAMERICA LIFE ILLUSTRATOR SOFTWARE DOWNLOAD INSTRUCTIONS\*

The Transamerica Life Illustrator provides sleek, streamlined reports that are informative, easy to understand, and highly customizable so you can tailor illustrations and quotes to help meet individual client needs. We're proud to offer our full suite of products on Life Illustrator to help you sell more efficiently and grow your Transamerica business.

### INTUITIVE, EASY TO NAVIGATE

- Policy summary highlights important policy coverage and case design values
- Benefit snapshot provides a quick view of projected policy benefits compared to premiums paid (IUL only)
- Visually appealing and robust product features and benefits overview

### HIGHLY CUSTOMIZABLE, PERSONAL, AND DYNAMIC

- IUL sales strategy reports help highlight the product's value proposition
- Transamerica brand strength and product benefits
- Select from a wide variety of cover images to match the diversity of your clients
- More informative and transparent long term care and living benefits reports

### SELL MORE EFFICIENTLY

- Simple input fields and an intuitive interface to easily run reports
- Customizable defaults to quickly run cases
- Quickly switch between all products to run quotes and illustrations

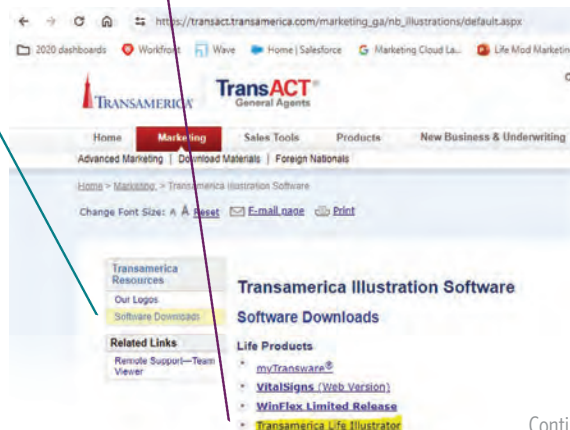
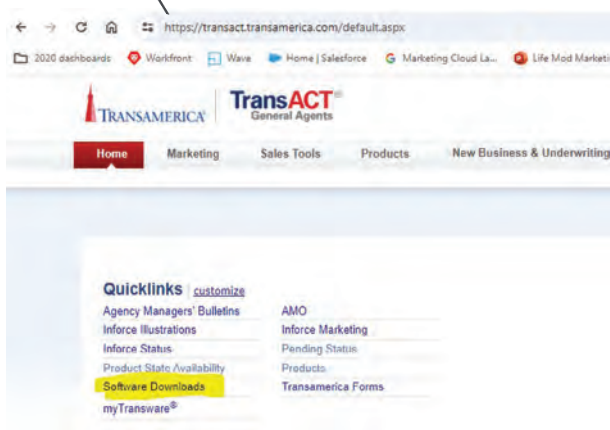
## YOUR STEP LIST

Log in to TransACT

Software Downloads

Transamerica Life Illustrator

Save a copy of tool to your computer for offline use.



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\* Software download requires a Windows 10 or higher, Intel 5th generation (or newer) CPU, or AMD Ryzen (or newer) CPU, and 8GB of RAM. The tool does not support Mac environments or the use of Windows emulators.



When you click on the file labeled ".exe", a series of messages/windows will appear to guide you through the install. This is normal.

**YOU'LL SEE**

1. Trust Transamerica Life Illustrator
2. An expanded view of #1
3. Windows Defender Protected Your Screen
4. An expanded view of #3
5. Welcome to the Installation Wizard
6. Select Destination (WELIS branded)
7. Completing the Installation Wizard - info is gathered
8. Completing the Installation Wizard - completed

**SELECT**

- SHOW MORE
- KEEP ANYWAY
- MORE INFO
- RUN ANYWAY
- NEXT
- NEXT
- NEXT
- FINISH



When finished, an icon will appear on your desktop. This should take less than one minute.

**System requirements:** Windows 10 or higher, Intel 5<sup>th</sup> generation (or newer) CPU or AMD Ryzen (or newer) CPU, and 8 GB of RAM. The tool does not support Mac environments or the use of Windows emulators.

**Should you decide to *Uninstall* this feature:**


1. On your computer, open Settings/Apps&Features/Transamerica Life Illustrator
2. Click UNINSTALL
3. Click UNINSTALL again
4. Are you sure? Click YES
5. You've Completed the installation Wizard - click FINISH


**HOW TO RUN AN ILLUSTRATION OR QUOTE****Once you have selected your product:**

- 1 Set up your case in the CASE DESIGN window. Add the necessary client and policy information needed to run the quote or illustration (Insured, Policy Design, Riders, etc.)

**PRO TIP:**

**For Term and Lifetime:** Click **Income Replacement Calculator** under Policy Design to help determine your client's coverage needs.



**For products with living benefits:** Click on  **Calculators** to help determine if you have an existing policy and are within Transamerica policy limits.

- 2 Customize your reports within  **Output Design**
  - Personalize the cover image
  - Select enhanced report options
  - Explore personalized sales strategies (IUL only)


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## HOW TO RUN AN ILLUSTRATION OR QUOTE

- 3 Review your settings
  - If this is your first time running Life Illustrator, be sure to check that your contact information is shown correctly under the  **Producer** section
  - Select  **Output Types** to view the illustration or quote as values and/or a PDF

### PRO TIP:

Select  **Tools** then **OPTIONS** to set your preferences for new cases, such as your state and cover photo. Also, set your PDF display mode to “display in the current window” for easier viewing.

- 4 Click  **Calculate** to run the quote or illustration

- 5 Save and name your client’s case under  **Cases**

### When your client is ready to apply for coverage:

- 6 Navigate back to Agent Home and launch the iGO® e-App to start a new application
  - For IUL:** Prior to launching iGO, download and save the final illustration PDF from Life Illustrator. Attach the illustration PDF when completing the client’s e-App.



TRANSAMERICA®

**The future starts today.**

 **Visit:** [transamerica.com](https://transamerica.com)

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