TransAmerica – eDelivery – Client Process

1. Insured/Owner receives email notifying them the policy has been issued and is ready for review and acceptance.

> **From:** shnbedelivery@transamerica.com **On Behalf Of** shnbedelivery@transamerica.com
> **Sent:** Tuesday, February 27, 2018 12:30 PM
> **Subject:** Your Insurance Policy is Available for Review Online
>
> Dear **Grant Lebahn**,
>
> Your new life insurance policy with Transamerica is all set. Enclosed is a link below to access your policy 6600424922 online.
>
> If you have any questions, please do not hesitate to contact your agent. Thanks again for allowing us to handle your life insurance needs.
>
> https://policyexconsumerportal.ipipeline.com/Account/LogOn
>
> Regards,
> *New Business*
> Transamerica Life Insurance Company

2. Click the link to access the policy. The last four digits of the client's SSN will allow access to the information.

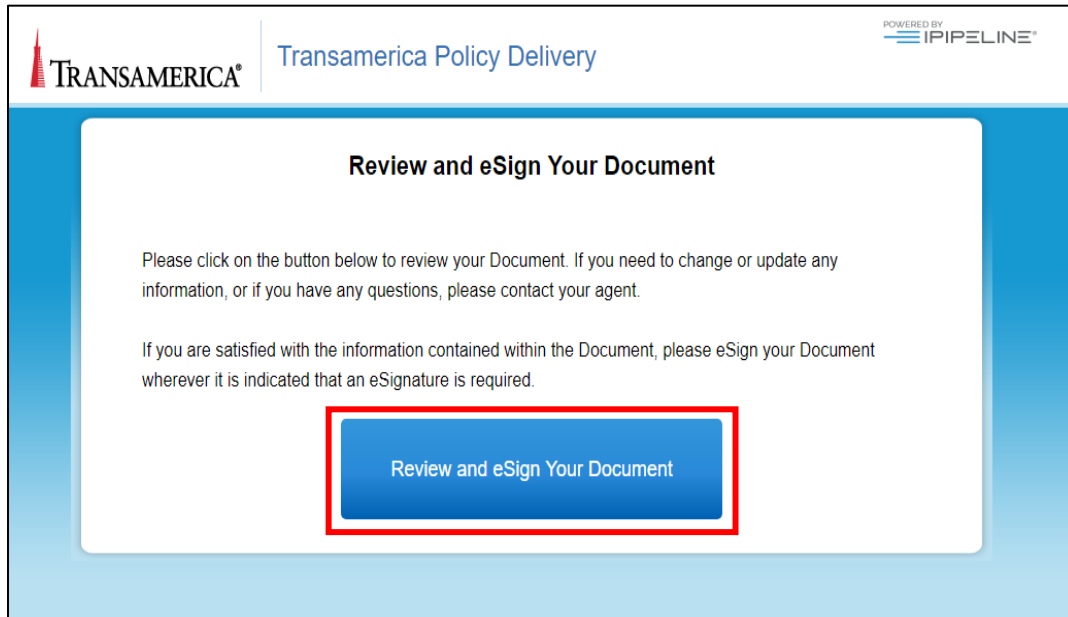**TRANSAMERICA** Transamerica Policy Delivery

Login

Welcome! Your insurance document is available for review. To ensure your information remains secure and confidential, please answer the question(s) below:

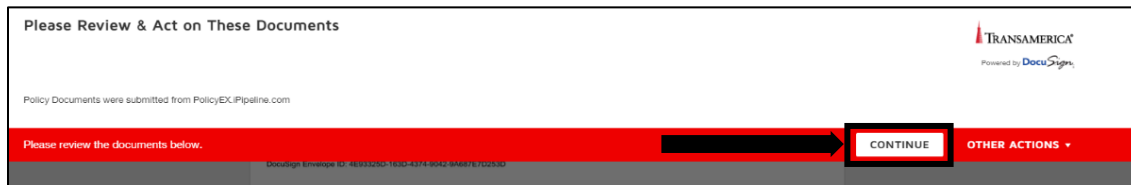What are the last four digits of your SSN?

[   ]
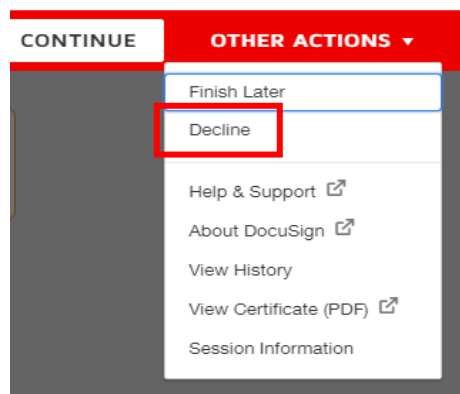
[Continue]

Trouble logging in?

3. Click to review and sign the documents.

4. Click Continue to review the documents.

5. If the policy is Declined, select Decline from the Other Actions menu. *(Help & Support and About DocuSign provide additional support and understanding about the process.)*

6. Review each document and complete electronic signature process.

ASH BROKERAGE

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