

HOW TO DO BUSINESS WITH TRANSAMERICA FAMILY MARKETS

Agents now have two submission choices when working with Transamerica Family Markets. You can use OAKTREE's Brokerage Service Team or use Transamerica Family Markets' direct access option.

OAKTREE Brokerage Service:

Submission:

- All new business applications should be faxed to 703-995-0813, emailed to brokerageservices@otfc.com or mailed to the address below.
- Please use the New Business Transmittal attached.
- If you do not receive an acknowledgement phone call and email with a policy number within 1 business day, please call for receipt confirmation. A team member can be reached at 800-842-9124 ext. 444.

Checking Case Status:

- You will receive regular case status emails and phone calls from Brokerage Services.

Requirements and Premium:

- Fax requirements to 703-995-0813 with a cover sheet indicating the client name/policy number.
- Mailing address is:

OAKTREE Life & Annuity Brokerage
4227 Lafayette Center Drive, Suite A
Chantilly, VA 20151
Attn: Brokerage Services

Transamerica Family Market's Direct Access:

Submission:

- New business applications should be submitted via fax directly to 800-535-1325, emailed to newbusinesscallcenter@aegonusa.com or mailed to the address below.
- Fax requirements to 800-535-1325 or email them to newbusinesscallcenter@aegonusa.com

Transamerica Family Markets
4333 Edgewood Road, NE
Cedar Rapids, IA 52499
Attention: New Business

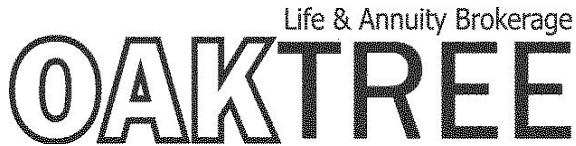
Checking Case Status:

- Agents can register to track cases on line at www.agentnetinfo.com
- Agents can call Transamerica Family Markets at 877-454-4768.

Please mail premiums to the address above.

Illustrations and Marketing Support:

- Agents contracted directly with OAKTREE Life and Annuity can call a member of the agent services team at 800-842-9124 ext. 406 or email them at agentservices@otfc.com
- Please call 877-454-4768 ext. 7833 for software support.



Brokerage Services

Fax Number: 703-995-0813

Oaktree Life and Annuity Brokerage

4227 Lafayette Center Drive, Suite A

Chantilly, VA 20151

Attn: Brokerage Services-800-842-9124 ext. 444

Please fill in fields below.

TRANSMITTAL

DATE:

AGENT:

AGENT CODE:

AGENT FAX NUMBER:

AGENTPHONE NUMBER:

PROPOSED INSURED:

CARRIER:

SSN OR POLICY # (IF AVAILABLE):

ORDER EXAM YES NO

TOTAL # OF PAGES (WITH COVER SHEET):

NEW APPLICATION

REQUIREMENT

LICENSING

INFORMAL APPLICATION

Comments:

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