

TFA IMPORTANT CONTACTS

Striving to ensure excellent service to TFA Representatives.

TRANSAMERICA FINANCIAL ADVISORS

Main Phone Number: 770-248-3271

Option 1	Customer Help Line
Option 2	TFA Registration and Securities Licensing
Option 3	TFA Business Review
Option 4	TFA Advisory Services
Option 5	TFA Account Reassignment
Option 6	TFA Brokerage Accounts and Pershing

TFAconnect Password Resets	<ul style="list-style-type: none">• To reset passwords, select “password reset” on the login page.• If you become locked out of your TFAconnect email, please allow 15 minutes for the system to reset and then try logging in again.• If you need help with resetting your password, please create a support case on MyWFG.com by selecting Help located at the bottom of any web page.
Account Reassignments (Securities Products only)	For representative reassignments on client accounts, please email TFGtransfers@transamerica.com .
Advertising Review	<p>Please submit all items for review via Red Oak, which is accessible by going to: MyWFG.com > Menu > Recruiting & Selling > Marketing Resources > Advertising Requests > Red Oak > Launch Red Oak > Input your agent Red Oak username and password</p> <p>If you have questions about the following items, please email redoakinformation@transamerica.com:</p> <ul style="list-style-type: none">• Retail communications• TFA representative websites• Public appearances• Sales contests• Signage
Business Review	Please submit questions regarding suitability or requests for additional information on suitability notices to TFABusinessReview@transamerica.com or call 770-248-3214.

<p>Compliance</p>	<p>Active and/or pending TFA representatives may send compliance-related questions to TFACompliance@transamerica.com. This includes:</p> <ul style="list-style-type: none"> ▪ U4 Section 14 disclosures ▪ Customer complaints (Written or Verbal) ▪ Regulatory inquiries ▪ Audits ▪ AML ▪ Privacy Policy ▪ Outside brokerage accounts <p>Fax completed forms to 877-539-0338.</p>
<p>Investment Advisory Services/Advisory Compliance</p>	<p>Questions related to Transamerica ONE, please email transone@transamerica.com. Questions related to Transamerica ALPHA, please email transalpha@transamerica.com. You may also call 844-487-2671. Assistance can be provided for the following:</p> <ul style="list-style-type: none"> ▪ Fee-based products and services ▪ Transamerica Wealth Management Strategies Platform ▪ Form ADV Part 2A and Part 2B ▪ Annual client reviews ▪ Policies and procedures manuals
<p>Pershing Business</p>	<p>Please email TFAbrokerageservices@transamerica.com or call 727-299-1693 for:</p> <ul style="list-style-type: none"> ▪ Trade- and Non-Trade-Related Inquiries ▪ Letter of Indemnification ▪ To obtain a GSR#, email TFARegistration@transamerica.com
<p>Regional Branch Managers (RBMs)</p>	<p>Assistance Line: 770-248-3303 - Available from 8:30 am - 8 pm (ET)</p> <ul style="list-style-type: none"> ▪ RBMs are registered principals who are responsible for the supervision of all TFA Registered Representatives (RRs) and/or Investment Advisor Representatives (IARs). ▪ If you do not have contact information for your RBM, please call the RBM assistance line listed above.

<p>Registration & Licensing</p>	<p>Please send all TFA registration-related questions via email to TFARegistration@transamerica.com or call 844-987-0900. You may also fax them to 877-440-2014.</p> <p>TFA Registration is responsible for:</p> <ul style="list-style-type: none"> ▪ Transamerica Registration Application (TRAC) processing ▪ FINRA, state and TFA approvals ▪ Non-Registered Associate (NRA) approvals and terminations ▪ RR & IAR terminations ▪ Amending U4 applications: <ul style="list-style-type: none"> - Adding and terminating state registrations - Residential address and personal information changes, including cell phone number updates - New branch registrations - Branch changes (Complete the Branch Office Revisions Change Form) - Rep transfers (Complete the Representative Transfer form) - Opening exam windows - Adding, updating and terminating Outside Business Activity (OBA) Disclosures <ul style="list-style-type: none"> • To add information for new or existing OBAs complete the OBA Disclosure form through TFA InForms. - Carrier branch address updates (Complete the Notice to Mutual Fund & Variable Contracts form) located on MyWFG.com with the Securities Forms. - Limited English Proficiency (LEP). Form located on MyWFG.com with the Securities Forms. - FINRA regulatory CE - GSR# - Split codes
<p>Technology</p>	<p>For questions about TFA technology, please email TFATechnology@transamerica.com.</p>
<p>Training</p>	<p>For questions about training, please email TFATraining@transamerica.com.</p>
<p>CellTrust (Texting Account)</p>	<p>To request a CellTrust texting account, please email TFATechnology@transamerica.com with the following information:</p> <ul style="list-style-type: none"> ▪ Name ▪ Cell Phone number ▪ WFG Agent Code (TFA Rep ID) ▪ Preferred Area Code <p>Only active TFA representatives (RRs & IARs) can obtain a CellTrust account.</p>

WORLD FINANCIAL GROUP INSURANCE AGENCY

Main Phone Number: 770-246-9889

- Option 1 Onboarding & Demographic Changes
- Option 2 Licensing & Appointments
- Option 3 Commissions
- Option 4 Marketing, Rings, Watches and WFG Store
- Option 5 Technical Support
- Option 6 TFA Securities or Advisory Questions
- Option 7 Compliance
- Option 8 Repeat

MYWFG > HELP	Questions for WFGIA can be submitted via a support case on MyWFG.com by selecting Help located at the bottom of any web page.
Commissions	Commission inquiries can be submitted via a support case on MyWFG.com by selecting Help located at the bottom of any web page.
Licensing & Appointments	<p>Upload AML certificates to BOSS if they are not automatically sent to WFGIA by the education provider. E&O Certificates for New York agents should be emailed to wfglicenseapps@transamerica.com.</p> <ul style="list-style-type: none"> ▪ To obtain appointments with approved carriers, appointment paperwork is located on MyWFG.com > Menu > Licensing & Appointments > Appointments. Send completed paperwork to WFGlicenseapps@transamerica.com. ▪ Once registered and approved in a state for securities, add your variable line of authority to your life license through the NIPR or SIRCON websites.
Obtain a Securities License	<p>For individuals who are not yet life licensed who want to pursue securities and/or advisory registration with TFA:</p> <ul style="list-style-type: none"> ▪ Complete the WFG Launch registration process to join WFGIA ▪ Complete the Securities Only AMA located on MyWFG.com > Menu > TFA > Join TFA. Send the completed form to: WFGIA@transamerica.com ▪ Please note: To reinstate with WFGIA, you will need to go to Registration.WFGLaunch.com.

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