

# WFG Agent / TFA Rep Advertising Submission Form

Email to: [WFGAgent-TFARepAdvertising@transamerica.com](mailto:WFGAgent-TFARepAdvertising@transamerica.com)

## AGENT / REP INFORMATION

Agent/Rep Name: \_\_\_\_\_ Code #: \_\_\_\_\_ Level (e.g. 17): \_\_\_\_\_ Office/Branch ID #: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Required for TFA Reps: (Check All That Apply): IAR Series 6 Series 7

WFG Co-Brand Name Information (if applicable): \_\_\_\_\_

Co-Brand Name Approved? Yes No Pending

Field Supervisor/Branch Manager Name: \_\_\_\_\_ Code #: \_\_\_\_\_ Office/Branch ID #: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

OSJ Manager Name (TFA Reps Only): \_\_\_\_\_ Code #: \_\_\_\_\_ Office/Branch ID #: \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Name Individual Submitting on behalf of Agent/Rep (if applicable): \_\_\_\_\_

Email: \_\_\_\_\_ Phone: \_\_\_\_\_

Field Supervisor's Electronic Signature (required for WFG agents levels 17 and below):

X \_\_\_\_\_ Date: \_\_\_\_\_

## SUBMISSION DETAILS

Advertising is on behalf of:	WFG/WFGIA (U.S. Only)	TFA	Both
Description of material: _____			
Intended Audience (Select all that apply):			
Clients	Public	Reps/Agents	Recruiting
Type of Material:			
Social Media - Facebook, Twitter, LinkedIn (TFA Reps Only – Complete Bottom of Next Page)			
Public Appearance / Presentation (Complete Top of Next Page)		PowerPoint Presentation / Speaker Notes	
Advertisement (newspaper, magazine, display)	Article	Banner	Billboard
Directory Advertisement: Telephone, Website	Email	Event (workshop, job fair, other)	Flyer
Letter	Newsletter	Outside Vendor Material	Poster
Radio Advertisement	Sign	Survey/Questionnaire	TV Commercial
Website (update/renewal)	Other: _____	Video	Website (new)
If this material has previously been approved, please provide the advertising tracking #: _____			

# WFG Agent / TFA Rep Advertising Submission *Continued*

## ADDITIONAL INFORMATION

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## PUBLIC APPEARANCE

Title of Seminar or Booth: \_\_\_\_\_ Date of Appearance: \_\_\_\_\_

### List all TFA Agent / WFG Agents who will be presenting:

Name: \_\_\_\_\_ Topic: \_\_\_\_\_ Code #: \_\_\_\_\_

Name: \_\_\_\_\_ Topic: \_\_\_\_\_ Code #: \_\_\_\_\_

### List any 3rd Party Guest Speakers who will be presenting:

Name: \_\_\_\_\_ Company/Organization: \_\_\_\_\_

Topic: \_\_\_\_\_

**All seminar/presentation materials, including slides, speaker's notes, outlines, scripts, handouts must be submitted for review.**

## BUSINESS SOCIAL MEDIA ACCOUNTS – TFA REP USE ONLY

TFA Reps are required to complete the TFA Social Media Course prior to creating and/or submitting a business social media account to Advertising Compliance for review. TFA OSJ/Branch Office Manager approval is required for levels 2 and 3 social media accounts and pre-approval by TFA Compliance is required. Level 1 business social media accounts do not require approval. Please see the TFA Social Media Policy and Procedures for complete details.

### I am submitting the following Business Social Media Account for level 2 or level 3 activity. Select all that apply:

LinkedIn - Activity Level: 2 or 3 • Facebook - Activity Level: 2 or 3 • Twitter - Activity Level: 3

#### Level 2 – LinkedIn / Facebook– Static Content Only:

List of services offered through TFA is allowed. No interactive content/posts are allowed for this level.

- OSJ/Branch Office Manager Approval Required
- Full TFA B/D & RIA Disclosure Required

#### Level 3 – LinkedIn / Facebook / Twitter – Interactive Content:

Interactive content feature is allowed for this level. TFA OSJ Managers and other supervisory personnel will review interactive content posts via SMARSH, TFA's approved third party service provider who archives interactive content. TFA Rep must authorize SMARSH to archive interactive content on their website.

- OSJ/Branch Office Manager Approval Required
- Full TFA B/D & RIA disclosure Required
- Confirmation of setup on social media archiving system required
- Payment of fees associated with annual social media archiving system required

**TFA OSJ/Branch Manager Electronic Signature / Approval required for social media account levels 2 and 3. Signature not required if emailed directly from TFA OSJ / Branch Manager email address.**

X \_\_\_\_\_ Date: \_\_\_\_\_