

TRANSAMERICA'S LEAD PILOT PROGRAM

Thank you for participating in Transamerica's Leads Pilot Program. As a key business partner, we want to enable you to grow your business quickly and efficiently.

We understand that building your client base means talking to the right clients at the right time. That's why we're thrilled to partner with you on this exciting new opportunity.

The leads generated in this program have been selected using advanced data science capabilities to identify high-value prospects most similar to your Transamerica book of business. Prospects are matched to your Transamerica customer pool based on their demographics, wellness, financial, and affluence commonalities. Our analytics experts chose prospects who they feel are great potential clients, and this custom list of individuals is tailored just for you.

LEADS PROGRAM CHECKLIST

- ✓ 1. Review your marketing materials kit.
- ✓ 2. Look for an email from your Transamerica IW containing a list of 50 unique leads. Save this email.
- ✓ 3. Reach out to your first 50 leads record your feedback in the Excel document (columns C, D, and E) within 30 days. Attach and return via the secure Zix portal.
- ✓ 4. Transamerica will optimize the lead algorithms based on feedback, and a second set of 50 leads from your Transamerica IW will arrive within the next 30 days.
- ✓ 5. Repeat step three.
- ✓ 6. Complete the seven-question survey that will be emailed to you by your Transamerica IW.

MARKETING SUPPORT

In addition to the list of leads, our marketing team will provide you with customized kits containing marketing materials and an overview of our product portfolio, including both agent and consumer guides.

ABOUT OUR LEADS

In an age when we're very sensitive to privacy and data collection, you might be wondering what steps we have taken to obtain consent. The underlying consumer data is generated by AnalyticsIQ (AIQ), our third-party data partner. AnalyticsIQ leverages public data sources, like census data and real estate information, as well as consumer opt-in data to create inferred data points to represent elements of a consumer's life and lifestyle.

If you have questions, please reach out to your RVP and IW team. Thank you for being part of an elite group of partners that will help us to evolve our business so we can work smarter, together.