

FRIDAY
July 16, 2010



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SAVE THE DATE – TFA TRAINING OPPORTUNITIES

The TFA Business Development & Training Department will be hosting the following workshops, conference calls and webinars over the coming weeks. We invite you to take advantage of these opportunities, which are designed to provide information and tools to help grow your business.

Getting Down to Business: Sales Ideas and Concepts You Can Use!

Wednesday, July 21st at 4:15 pm ET

TFA Marketing's Getting Down to Business webinar series is designed to equip you with a wealth of new sales ideas and concepts that you can use to enhance the value you bring to your clients. We're excited to feature **Jackson National**, one of our premier annuity vendors, for our July 2010 Webinar.

Jackson National – "The Client-Centered Advisor"

Join us for an informative, web-based seminar that will show the importance of being a client-centered advisor and how this can help you build a loyal client base.

"The Client-Centered Advisor" covers how to:

- Develop a client-centered focus that can help attract high net-worth clients
- Increase assets under management by creating and retaining loyal clients
- Implement client engagement programs to build loyalty and generate referrals

Registration and login information:

To join the meeting, click this link at the scheduled time:

<http://jackson.fugent.com/common/mlogin.asp?930830>

Name: The Client Centered Advisor

Duration: 60 minutes

Password: Jackson

Important! Join the meeting prior to dialing into the call!

*The teleconference information below is provided as a reference. In order to accurately join the teleconference call and participate in any live Q&A, you will need an ATTENDEE ID # that is assigned to you upon meeting login. Please login to the online portion of the meeting and follow the prompts to join the teleconference call.

Teleconference Number: 866-469-3239

Teleconference Passcode: 00052802

We look forward to speaking with you on July 21st at 4:15pm Eastern.

Important Changes to WRL Annuity Administrative Procedures

Tuesday, July 27th at 4:00 pm ET

Late in 2009, Transamerica Capital Management (TCM) announced the transition of post- issue Western Reserve Life Assurance Co. of Ohio (WRL) annuity administration from St. Petersburg, FL to TCM in Cedar Rapids, IA. Since the transition, TCM has identified several WRL administrative practices that will be changed to mirror the current TCM practices. Please [click here](#) to see what is changing, when the changes are effective and what action(s) may be required by the representative or contract owner.

To help you understand these changes, TCM will be conducting a "Town Hall Conference Call" on **July 27th at 4pm ET**, so please mark your calendars and join TCM for this informative session.

Dial in information for the conference call:

Teleconference Dial-In #: (800) 260-0719

Confirmation Number: 164978

Participant Access Code: 164978

Date of Call: 07/27/10

Start Time: 4:00pm ET

LaserApp Training Webinars:

**Through September 21st, 10:00 am ET/ 1:00 pm PT
6 Convenient Dates to Choose From!**

Learn how to streamline your practice by using your existing data to fill out paperwork for you. LaserApp and TFA will be conducting a series of live training webinars centered on using LaserApp Enterprise.

Topics covered during these training sessions will include: getting started with LaserApp, installing forms, how to create and share forms groups, how to print & save forms, and how to automatically fill forms using your existing client database or CRM.

Please [click here](#) for the webinar schedule.

PERSHING UPDATES

Please [click here](#) for details on the July 2010 updates from Pershing, including:

- **Changes to Pershing's Alternative Investment Policy** - with explanations of Pershing's alternative investment criteria and a new \$50 monthly service fee imposed to client accounts that hold ineligible positions.
- **Pershing Omnibus Conversion with ING & Pioneer Funds** – outlines changes to your 12b-1 service fee payments and a shortened

settlement date period during the conversion period.

After reviewing the details of the updates, please contact Rep Relations if you have any additional questions.

REVISED EXHIBIT A TRANSACTION CHARGES AND FEE SCHEDULE FOR CAPITAL ACCOUNTS WILL BE INCLUDED IN JULY PERSHING STATEMENTS

Due to the revisions to certain Pershing transaction charges, as was communicated on 6/28/2010, clients participating in the Capital Account Program must receive an updated Exhibit A Fee Schedule, with the September 1, 2010 effective date. Originally the intention was to deliver the revised Exhibit A in the 2nd Quarter Performance Reports. However, there has been a change to the delivery schedule. The revised Exhibit A will now be included in the July Pershing statements as an insert. Below is the applicable Pershing statement message your client will see and attached is a copy of the revised Exhibit A.

[Click here](#) to view Exhibit A.

Clients that open Capital Accounts during the month of July will receive a revised Exhibit A via mail at the beginning of August. Online Capital Account Client Services Agreements and kits will be amended to include the new Exhibit A later this month.

If you have any questions, please contact Rep Relations at 1-800-322-7161, option 3.

BEGINNING SEPTEMBER 1, 2010, THE FOLLOWING TRANSACTION CHARGES AND FEES WILL BE CHANGED AS INDICATED BELOW:

Listed and Over the Counter Equities: \$27.50
Unit Investment Trusts: \$30
Options: \$25
Load Mutual Funds⁽¹⁾: \$15
No Load Mutual Funds⁽¹⁾: \$15
Trade Confirmations: \$2.50

(Please note: All charges are per transaction per account.)

⁽¹⁾Certain mutual fund families have an additional \$10 transaction charge: Aegis, Alpine, Bridgeway, CGM, Colorado Bondshares, Dimensional Fund Advisors, Dodge & Cox, Fairholme, Longleaf Partners, Meridian, New Alternatives, Northeast Investors, Oberweis, Pacific Capital, Pimco Institutional, Sequoia, Schneider, Stratton, and Vanguard. This list is subject to change.

ENCLOSED WITH YOUR STATEMENT IS A COPY OF THE REVISED EXHIBIT A CAPITAL ACCOUNT PROGRAM TRANSACTION CHARGES AND FEES.

SUMMER RECRUITING INCENTIVE

TFA is pleased to announce its first **Summer Recruiting Incentive!**

Between now and August 31st, for each eligible* rep you recruit, TFA is offering a special summertime incentive.

[Click here](#) for more information on this exciting summer program!

We want to encourage each of you to become more involved in recruiting.

To learn more about the value of recruiting and how TFA can help you, please contact our Recruiting Manager, Tiffany Taylor, at (800)322-7161, option 1, ext 123-2297 or at ttaylor@aegonusa.com.

*Eligibility based on previous 12 months GDC. For more details on prizes and eligibility, please reference the linked information sheet.

If you have any questions regarding any portion of this email, please contact Rep Relations at (800) 322-7161, option 3.

[Come visit our website!](#)

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