

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.

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.

FIRM ELEMENT CE – REGED WEBSITE MAINTENANCE

RegEd will be unavailable due to routine system maintenance to their website on Saturday, July 24th starting at 10:00 pm ET through Sunday, July 25th at 1:00 am ET. All systems

will be online and available by 1:00 am ET on Sunday, July 25th. We apologize for any inconvenience this may cause.

SYNERGY UPDATE

Reminder to OSJs, the C&S Blotter Reports are loaded monthly into the Surveillance folder under the OSJ Branch folder for OSJ review and approval.

- New enhancement starting 7/26: if the "Sponsor Name" field on the Statement template is populated, the document will route into a subfolder by that field under the rep's Statement folder. If the sponsor name on the template is blank then the document will file directly into the Statement folder without a subfolder.
- New Password policy goes into affect 7/26. Passwords will have to meet the following guidelines:
 - Reset required every 120 days
 - Passwords must be at least 6 characters and no more than 25 characters, contain at least one upper and lowercase letter, one number and no spaces

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.

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
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