

A woman with curly hair and a man in a suit are looking at a tablet together. The woman is on the left, and the man is on the right. They are both looking at the tablet with interest. The background is a blurred outdoor setting with a railing.

WFG Platform Fee

United States & Puerto Rico



A Transamerica Company

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Everything Your Business Needs in One Platform

There are services and tools that are essential for an entrepreneur's business to succeed. However, it can be difficult to assemble, integrate, update and maintain the software, sales systems, marketing programs, training tools, technology and client services they need. For many entrepreneurs, the complexity of orchestrating such a platform can push business ownership out of their reach.

WFGIA's scale as well as our knowledge and experience with technology creates a massive advantage for new business owners. The power of our platform gives entrepreneurs a cost-effective path to launch a competitive financial services business on day one. Our platform also provides the support, training and access to well-known product providers you need as you grow your business to your vision of success. Access to all of this is available through one low-cost monthly charge: the Platform Fee.

The Platform Fee

A monthly payment that connects your business to top-tier technology and resources.

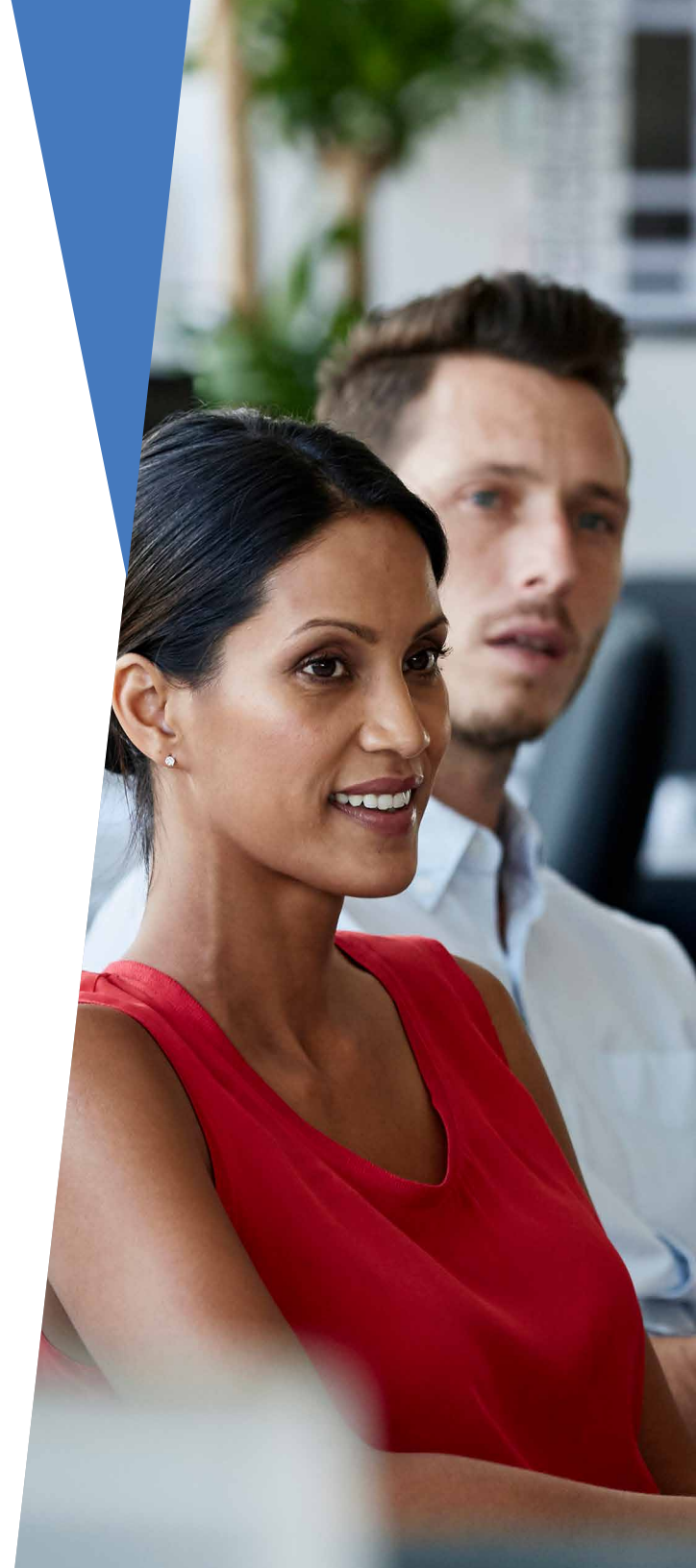
The Platform Fee has been simplified, so there is just a single fee for life licensed-only agents and one fee for individuals who are TFA representatives. All licensed agents/representatives must pay the fee each month as failing to do so can result in limited access to MyWFG and termination from WFGIA and TFA, as applicable.

All licensed agents/
representatives
must pay the
Platform Fee each
month.

The Platform Fee

Life License	Registered Representative/Investment Advisor Representative
\$15 per month	\$100 per month

The Complete Business Platform for Financial Services Professionals





Build Your Team

Building a team of entrepreneurs requires tools to help you stay organized, identify where new associates are in the process of becoming licensed, prompt them to take the next step, and communicate with everyone on your team.

Associate Onboarding*

The WFG Launch platform allows new associates to access tools designed to help them get licensed, trained and start recruiting.

Automated Communication

From day one, new associates and their upline leader receive timely, automated messages that help simplify their success with actionable information.

Track Your Team

Use our Engage platform to help fill your recruiting pipeline, and move and track prospects through the steps to join your team.

Team Member Reporting

Generate custom reports to track your team member's progress, production and path to reach their goals.

Team Email

Send updates, invitations and announcements to your team with trackable messages that can help drive responses.

Training Center

Accessible through MyWFG, this is a one-stop shop for all training on a wide variety of topics.

* Not available in California.



Increase Your Sales

Competing in today's market demands that you have the financial products and services, marketing systems, and sales tools to build your brand, attract prospects, meet client needs and track sales.

Providers You Know

Help meet the needs of your clients with a wide-range of financial products and services from some of the most well-known and respected companies in the industry.

Benefit From Email Campaigns

Access hundreds of pre-approved, written and designed messages to keep you connected with those whom you do business.

Build Your Web Presence

Create awareness of your business and the services you offer using your own website, provided by the company, and build followers using company-created social media content.

Access Content Libraries

Obtain provider materials and company-created marketing materials to share with your prospects, team and clients.



Serve Your Clients

The greatest way to build your success is to provide excellent service. By leveraging available technology, you have a virtual assistant to help you serve your clients faster and meet their needs more efficiently.

Application Management

Complete applications, receive notifications and track underwriting status using e-application tools such as iGo and Firelight.



Protect Your Business

In a highly regulated industry, the Platform Fee equips you with the tools to build your business in a compliant manner.

RightBRIDGE

Help determine the suitability of products based on your clients' specific needs.

Recruiting, Sales and Training Material

Pre-approved brochures, presentations and other material are available to agents so they can focus on growth.

Tools that Support Your Business

For WFGIA agents, the one platform they need to run their business is available from day one. Our Business Platform is comprised of proprietary services and third-party technologies thoughtfully integrated to help you grow, manage and protect your business. Starting a business in the financial industry is now possible for almost anyone.

Proprietary Systems & Services

WFG Launch

New Associate Onboarding

Appointment Management

Provider Appointment Process

Agent Reports

Team and Production Tracking

Advancement Management

Promotion Progress Tracking

Service Center

Knowledge Articles and Agent Support

Personal Agent Websites

Pre-approved and Customizable Agent Websites

Third-Party Tools & Technologies

Engage

Manage your prospects, clients and recruits

iGo

Electronic Client Applications

Training Center

Agent Virtual Video Library

RightBRIDGE

Product Suitability Analysis

Firelight (TFA Representatives)

Electronic Applications for VA and Mutual Funds

Docupace (TFA Representatives)

Electronic Document Management

InForms (TFA Representatives)

OBA, ARQ, ADV Part 2B and Questionnaires

Morningstar Annuity Intelligence (TFA Representatives)

Annuity Information Database

Smarsh (TFA Representatives)

Encrypted Email and Data Archival

Platform Fee Details

Now that you know what is included for the cost of the Platform Fee, let's take a closer look at how it works and the incentives we have in place to help offset the overall cost.

Recurring Payments

We encourage all WFGIA agents to sign up for recurring payments for the Platform Fee via Payment Central on MyWFG to ensure continued unlimited access to the business platform. Those agents/representatives who do not sign up for recurring payments will have limited access to MyWFG until they do so.

Following your authorization, monthly payments are made on or about the 1st of each month. If this day lands on a weekend or a holiday, then payments may be processed on the next business day.

In the event a monthly transaction is rejected or declined, the Balance Due will remain outstanding and the authorization may be terminated. An outstanding Platform Fee balance will cause you to have limited access to MyWFG until it is paid in full.

Termination & Roll Up

Any agent with an outstanding Platform Fee balance greater than two months of the amount charged will receive an email that serves as a 30 day notice to pay their full balance before being terminated from WFGIA. The agent's upline SMD and CEO MD are also notified.

The Platform Fee balance does not roll up if the terminated agent is a life licensed agent at the Marketing Director level or below.

An Impressive Platform

With the remarkable spectrum of services and technologies built into the WFG Business Platform, it may seem that only a few could afford to access it. However, the entire platform is available to every WFGIA agent at a very affordable cost.

The Platform Fee is part of our ongoing commitment to protect and equip WFGIA agents with the best technology, service and platform in the industry.



