

Important: Updated Transfer Process

- Agents are responsible for sending all transfer documents to the relinquishing institution. Agents do not have to send **originals** to WFG DC.
- All copies of documents (Trade Ticket, KYC form, etc.) must then be sent to WFG DC for processing and to notify the receiving institution.
- Relinquishing institutions may require signature guaranteed transfer documents. Agents are responsible for signature guaranteeing and following up on any transfer documents. If you do not have a signature guarantee stamp, you can:
 - Request your RBM to signature guarantee the transfer document by emailing your RBM. Your RBM will provide you with the signature guaranteed document, and you will be required to send it to the relinquishing institution. If you are requesting the RBM to signature guarantee a document for a new client, you will have to send the NAAF/KYC form to verify the client's signature.

You can forward your documents to our RBM team by email at RBMinbox@transamerica.com or by fax at **1-844-773-2386**.