

World Financial Group Directory



WFG HOME OFFICE DIRECTORY

The WFG home office team is here to support you regardless of what stage you're at in building your business. Learn about all the various support teams, what areas they can assist with and how to reach out to them.

Field Agent Support Team (FAST)

FAST provides support and training exclusively to newly licensed agents for the first 6 months that they are active with WFGIA. FAST Consultants proactively focus on helping new agents get started by getting to know crucial processes like appointments, commissions, sales tools, and the WFG platform resources.

Phone: 770.246.9889

More Info: <https://www.mywfg.com/fast>

Business Productivity Consultants (BPC)

The BPC team provides virtual and in-office training for all licensed agents. Training topics offered include commissions, points, recruiting, technology and various other aspects of the WFG platform.

Find your regional BPC: <https://www.mywfg.com/bpc>

Agent Services

Open to all SMD level agents and above, the call center is composed of individuals who can help with a variety of general questions and issues. EMD level agents and above can reach out to this team through live chat and CEO MD level agents and above will receive a dedicated concierge team or Elite Partners to contact directly.

Phone: 770.246.9889

Knowledge Articles and Support Cases

All active agents can find detailed answers to our most commonly asked questions by searching through our extensive collection of knowledge articles. In the event your inquiry is not addressed, you can always submit a support ticket anytime and receive a timely response from a subject matter expert.

View our knowledge base: <https://tfn.force.com/support/s/>

Support cases can be submitted for the following areas:

- Commissions
- Compliance





- Distribution (WFG Store, Rings & Watches)
- Field Contracting & Coding (Onboarding, Level Changes, Transfers)
- Field Relations (BSSOE, Hierarchy Changes)
- Licensing & Appointments
- Marketing (Recognition, Yext, Marketing Materials)
- Platform Fees/E&O
- Points (Promotions, Bonus Pools)
- Tax Documents
- Technical Support (Email, Password Reset)
- WFGIA Supervision

You are in business
for yourself, **but**
never by yourself.

COMPANY MAILBOXES

While we encourage all agents to call the home office or submit a support ticket for most issues, there are some circumstances where inquiries should be directed to a specific email box monitored by the home office.

Onboarding Agreement

Prospective recruits interested in joining WFGIA should complete an Associate Acknowledgement through our online registration site. In the event of technical errors, a completed PDF version of the Associate Acknowledgement can be emailed to wfgcoding@transamerica.com.

Electronic Option (fastest): <https://registration.wfglaunch.com/>

Email option for paper agreements: wfgcoding@transamerica.com

Agent Information Changes

Personal contact information on file with the home office such as home address, personal email address, phone number, spouse information and recognition settings can be made through your MyWFG profile.

MyWFG Profile: <https://www.mywfg.com/profile>

For name, business address, or SSN/SIN change, please complete our [Complete Agent Information Form](#) and send to wfgcoding@transamerica.com.

Paper Appointment Requests

While in most cases provider appointments can be made online, appointment paperwork can be submitted manually to the License Appointments email address listed below as needed.

Email: wfglicenseapps@transamerica.com

Recognition Photos

As you hit major milestones in your WFG career such as earning a ring or achieving a promotion, we encourage you to make sure you have an up-to-date headshot on file with the home office so we can recognize you on MyWFG and our social media accounts.

Email: wfgphotos@transamerica.com

More Info: <https://www.mywfg.com/ring-and-watch-guidelines>

Advertising Requests

SMD and above level agents can submit their own advertising materials to our compliance team for review to ensure that it is appropriate for public use. CEO MD and above level agents can also schedule time to personally meet with advertising review to go over any questions.

More Info: <https://www.mywfg.com/wfg-advertising-guidelines>

Schedule Time with Advertising Review Team (must be Level 70 or higher): <https://calendly.com/wfg-tfafiieldadvertising>

OUTSIDE VENDORS

Support for these areas of the WFG platform is managed by our partner companies.

Campaign Manager

Our Campaign Manager tool for pre-approved social media, email and other marketing assets is powered by Outstand.

Email: support@outstand.com

Phone: 800.865.7496

More Info: <https://wfgcampaigns.com/support>

E&O

Errors & Omissions insurance is required for all active licensed agents with WFGIA. Non-NY agents in the U.S. must use Marsh as their E&O provider.

Marsh

Phone: 1.800.380.0451

Email: EandOServices@marsh.com



OTHER RESOURCES

The areas below are frequently accessed areas of MyWFG that offer additional information, resources and support.

TFA / WFGIA Important Contacts

[WFG TFA Department Contacts](#)

On-Demand Videos and Webinar Recordings

Visit the [WFG Training Center](#) for required courses, helpful on-demand training videos, and recent webinar recordings.

New Agent Training

Visit the [US New Agent Hub](#) to find all the most helpful onboarding resources for newly licensed agents in one centralized location.

Pre-Approved Marketing Materials

[Campaign Manager](#) provides agents with a full library of marketing assets that are all pre-approved and ready to share with clients and prospects. Find emails, social posts, PDF's, videos and more for all occasions and topics.

The [WFG Store](#) houses all of our approved brochures and presentations. These pieces can be used to help with both sharing the WFG business opportunity and spreading financial literacy. Physical copies can be ordered, or free digital downloads are also available.