

## Transamerica — New Business Checklist

**In order to do business with Lorence and Vander Zwart and Transamerica:**

1. LVZ must have on file a signed Solicitors Agreement.

In addition to the form listed below, your broker dealer may have additional requirements such as requiring account information forms, third party disclosure documents or other requirements.

**The following forms need to be completed and returned directly to LVZ to add third party management.**

LVZ Investment Management Agreement Form

LVZ Investor Suitability Questionnaire

LVZ Solicitor Disclosure Brochure

Transamerica Authorization & Advisory Fee Liquidation form

**The following forms need to be provided to your client:**

Copy of Lorence & Vander Zwart ADV Part II



**Did you know:**

LVZ can fill out your paperwork for you with your client's consent?

The above forms are available on Laser App and our website?

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