

EASY ACCESS TO YOUR ACCOUNT

Taking charge of your future starts with knowing where you stand — that's why your Transamerica account is built for easy access. You can review the current status of your account, make changes, and access tools to help personalize your retirement strategy.



ONLINE ACCESS
[TRANSAMERICA.COM/PORTAL/HOME](https://www.transamerica.com/portal/home)

GETTING STARTED

Step 1: Click **Create an account** in the top-right corner.

Step 2: On the next page, you'll be prompted to enter your Social Security number and go through a verification process.

ONCE YOU'RE IN

From the left-hand menu, scroll over the five tabs — **Home**, **Review**, **Manage**, **Are You OnTrack®**, and **Resource Center** — and select an option from the drop-down lists.

CHECK ACCOUNT BALANCE

- Balance automatically appears on the overview page
- For account balance by fund, click "**Balance**"

REVIEW INVESTMENT PERFORMANCE

- To get performance and fee details for all the funds in your plan, click "**Fund and Fee Information**" under the Review tab

PLAN YOUR RETIREMENT OUTLOOK®

- Our planning tools can help you develop and analyze your strategy across all your retirement accounts — inside and outside your plan

CHANGE CONTRIBUTION AMOUNT

- To choose or change your contribution amount and sign up for annual, automatic increases, click "**Contributions**" under the **Manage** tab

You should evaluate your ability to continue the auto-increase service in the event of a prolonged market decline, unexpected expenses, or an unforeseeable emergency.

TRANSFER BETWEEN INVESTMENT OPTIONS (CURRENT ASSETS)

- To transfer balances between individual or groups of funds, click "**Transfers**" under the **Manage** tab
- To change your overall investment mix, click "**Current Investments**" under the **Manage** tab

GET LOAN DETAILS

- To review loan status and get payoff details for current loans (if applicable), click "**Loan Details**" under the **Review** tab

NAME OR CHANGE A BENEFICIARY

- To name or change your beneficiary, click "**Beneficiaries**" under the **Home** tab

Please note that if you are married and designate someone other than your spouse as a "primary" beneficiary, spousal consent may be required.

COMPLETE YOUR ONLINE PROFILE

- Add an email address to your account so you can be notified of suspicious account activity
- Create three security questions for additional account protection
- Consider adding an alternate email address for another line of communication

*See important disclosures on the following page.



DOWNLOAD THE TRANSAMERICA APP FROM THE APP STORE OR GOOGLE PLAY

With the Transamerica app, planning for your retirement has never been easier.

- View your account balance and rate of return
- Know *Your Retirement Outlook*[®]
- Take action right from your device



PHONE ACCESS 800-401-8726

Transamerica Voice Pass, our voice-recognition system, can provide security and convenience without having to remember a password when you call our Customer Care team. Voice Pass will identify you based on a stored voiceprint as unique as your fingerprint. Once set up, all you'll need to do when you call is repeat the phrase, "At Transamerica, my voice is my password" to access your account.

CALL US:

Step 1: Call 800-401-8726.

Step 2: Let us know who you are. If you're calling from the phone number we have on file, we'll identify you that way. If you're calling from a different phone number, enter or say your Social Security number.

Step 3: If it's your first time calling, follow the prompts to set up Voice Pass. If you've called us before, we'll ask you to verify your identity using your voice.

Access Your Account Online to Get Started.

Tomorrow starts today.

 **Visit:** transamerica.com/portal/home

 **Contact:** 800-401-8726

IMPORTANT: The projections or other information generated by the engine, which produces *Your Retirement Outlook*[®], regarding the likelihood of various investment outcomes are hypothetical in nature, do not reflect actual investment results, and are not guarantees of future results. Results derived from the tool may vary with each use and over time. Please visit your plan website for more information regarding the criteria and methodology used, the engine's limitations and key assumptions, and other important information.

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