Managing & Accessing TransAmerica Online - 401 (K) Retirement Plan

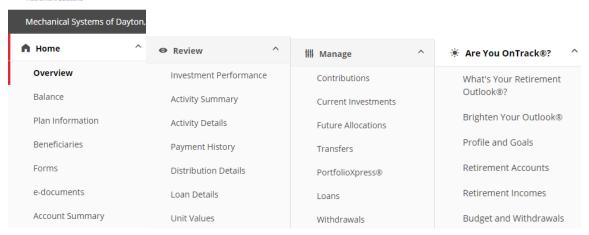
Plan Information – Forms – Contributions – Statements and More...

Logging into your TransAmerica online Account will allow you to make personal updates quickly and easily such as contribution rate changes, address updates, and beneficiary designations.

From the main menu you can access multiple options and choices that will allow you to meet your specific need and to manage your 401 (K) account to meet your future needs.

If you have not already created you online account, then you will need to refer to the **401 (K) Portal Instructions** (listed below) to create your TransAmerica online account.







PARTICIPANT FORMS

Listed below are the forms available under your retirement plan. You can view, download, and print these forms using the free Adobe® Acrobat® Reader.

Once you print these forms, you will need to complete them, sign where indicated and submit them as instructed on the form.

Rollover Form
This form is used when requesting a deposit of funds from a previous employer's qualified plan into your new employer's qualified plan.

Traditional 401(k) to Roth IRA Rollover Form
Use this form if you are requesting all or a portion of your Traditional 401(k) account to be rolled over to a Roth IRA due to retirement, separation from service, termination of employment, direct rollover, etc. Please see the form for details. Access this form in Spanish.

Beneficiary Designation Form
With this form you will name the beneficiary(ies) of your retirement plan benefits in the event of your death. Access this form in Spanish.

Distribution Request Form
Use this form if you are requesting a distribution of all or a portion of your account due to retirement, separation from service, termination of employment, direct rollover, etc. Access this form in Spanish.

NOTE: Paper requests for Electronic Fund Transfers/ACH for a withdrawal of \$50,000 or more, excluding rollovers, will be provided with a physical check. The check will be sent via overnight delivery to the participant address on record, at no additional cost.

Explanation of Distribution Options

Minimum Required Distribution Form

Use this form if you're age 72 or older and you're required to take a minimum distribution from your account. Access this form in Spanish.

Qualified Birth and Adoption Form

Use this form if you are the requirements of a hardship withdrawal. Please see the form for details. Access this form in Spanish.

Death Benefit Claim Form (Spousal Beneficiary)

Use this form if you mee the requirements must be met. Please see the form for details. Access this form in Spanish.

Loan Request Form

Use this form if someone other than the surviving spouse is designa

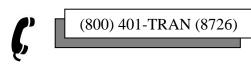
ONLINE INSTRUCTIONS

VIA THE INTERNET:

https://www.transamerica.com/register-account/#page-0

- 1 Go to https://www.transamerica.com/register-account/#page-0
- 2 Select Individual, click Next
- 3 Select Retirement Plans, click Next
- 4 Follow the instructions on the "Create Your Account" screen, click Submit
- 5 Continue to follow the instructions until you have completed your account set up.
- 6 Once this information is validated you will be able to create your account with the User ID and Password of your choice.

VIA TELEPHONE:



Participant Inquiries: Employee Solutions Desk

Telephone: (800) 401-8726

Email: employeesolutions@transamerica.com

Hours Available: 7:00 AM to 7:00 PM CT.