

# 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.

Mechanical Systems of Dayton,

Home	Review	Manage	Are You OnTrack@?
<b>Overview</b>	Investment Performance	Contributions	What's Your Retirement Outlook@?
Balance	Activity Summary	Current Investments	Brighten Your Outlook@
Plan Information	Activity Details	Future Allocations	Profile and Goals
Beneficiaries	Payment History	Transfers	Retirement Accounts
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Account Summary	Unit Values	Withdrawals	



### 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 the participant is requesting a Qualified Birth or Adoption Distribution. A Qualified Birth or Adoption Distribution is an in-service withdrawal available to parents of a new born or adopted child. Please see the form for details.

#### [Hardship Withdrawal Request Form](#)

Use this form if you meet 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 the surviving spouse is the sole designated beneficiary on the account. Access this form in [Spanish](#).

#### [Death Benefit Claim Form \(Non-Spousal Beneficiary\)](#)

Use this form if someone other than the surviving spouse is designated as a beneficiary on the account. Access this form in [Spanish](#).

#### [Loan Request Form](#)

Use this form to request a loan. Certain requirements must be met. Please see the form for details. Access this form in [Spanish](#).

#### [IRS Special Tax Notice](#)

This notice explains how you may continue to defer federal income tax when requesting payments from your qualified Plan.

## ONLINE INSTRUCTIONS

### VIA THE INTERNET:



- 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:



(800) 401-TRAN (8726)

<b>Participant Inquiries:</b>	Employee Solutions Desk
Telephone:	(800) 401-8726
Email:	<a href="mailto:employeesolutions@transamerica.com">employeesolutions@transamerica.com</a>
Hours Available:	7:00 AM to 7:00 PM CT.