Transamerica℠

Easy access to your account

Taking control of your retirement journey should be simple. That's why your Transamerica account is built for easy access on any device.

Set up your online account at transamerica.com/portal

Getting started

- Click **Create an account** in the top-right corner
- You'll then be prompted to enter your full name, date of birth, Social Security number, and contact information
- Next, create a unique username and password and set up your security questions
- If you already have an online account, click **Log in** in the top-right corner

Completing your profile

- If you're a first-time user, log in and click **VIEW DETAILS** next to your account. You can then set your contribution rate, create an investment strategy, and review and confirm your contact information.
- If you're already enrolled, review your contact email and phone number by clicking your initials in the top-right corner and selecting personal information. Consider adding your phone number and alternate email address and selecting text messages for important retirement plan reminders.

Once you're in

From the top navigation, scroll over the tabs – **My Plan, Investments, Contributions, Loans & Withdrawals, Documents & Forms,** and **Resources** – and select an option from the drop-down lists.

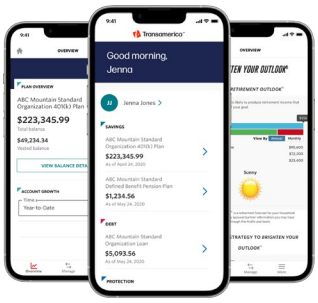
Here, you can take control of your retirement and plan for your financial future.

- Check account balance
- Use our *OnTrack*® tool to help create and easily modify your retirement income strategy
- Transfer between funds
- Review investment performance
- Manage contributions and fund allocations
- Review options for prior employer retirement plan accounts

Transamerica Retirement App

With the Transamerica Retirement App, preparing for the future has never been easier.

- Enroll in your plan
- Check your balance
- Adjust your contribution rate
- Manage your investments
- Add or update your beneficiaries
- Sign up for security alerts
- Enable facial recognition for enhanced security



Set up Voice Pass: 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.

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 before, we'll ask you to verify your identity with your voice.

Access your account to get started

Visit: transamerica.com/portal

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.

Securities offered by Transamerica Investors Securities, LLC (TIS), member FINRA, 440 Mamaroneck Avenue, Harrison, NY 10528. All Transamerica companies identified are affiliated but are not affiliated with your employer.

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