

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

## GETTING STARTED

- Click **Create an account** in the top-right corner
- On the next page, you'll be prompted to enter your Social Security number and go through a verification process
- If you've already set up your online account, click **Log In** in the top-right corner

## COMPLETING YOUR PROFILE

- Add an email address to your account so you can be notified of suspicious account activity
- Consider adding an alternate email address for another line of communication

## ONCE YOU'RE IN

From the left-hand menu, scroll over the tabs — **Home, Review, Manage, Are You OnTrack<sup>®</sup>**, and **Resource Center** — 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<sup>®</sup>* tool to help you create and easily modify your retirement income strategy
- Transfer between funds
- Review investment performance
- Manage contributions and fund allocations
- Name or change a beneficiary
- Fill out the form to start the transfer of your outside retirement assets to your plan
- Review loan status and payoff details

Review the fees and expenses you pay, including any charges associated with transferring your account, to see if consolidating your accounts could help reduce your costs. Be sure to consider whether such a transfer changes any features or benefits that may be important to you.



## 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
- Review *Your Retirement Outlook*<sup>®</sup>
- Sign up for security alerts
- Create Wealth + Health<sup>SM</sup> journeys



## 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 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](https://transamerica.com/portal/home)

 **Contact:** 800-401-8726

**IMPORTANT:** The projections or other information generated by the engine, which produces *Your Retirement Outlook*<sup>®</sup>, 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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