

PROVIDING EASY ACCESS TO YOUR ACCOUNT

Whether you prefer a laptop, desktop, tablet, or smartphone, you can access your Transamerica account when you want, how you want, where you want.

YOU CAN MANAGE MORE ASPECTS OF YOUR ACCOUNT ONLINE OR OVER THE PHONE STARTING .

You can review the current status of your account, make changes, and access tools to help you personalize your retirement strategy.



Download the My TRSRetire app from the App Store or Google Play

With the My TRSRetire app, connecting with your retirement plan has never been easier.

- View your account balance and rate of return
- Know *Your Retirement Outlook*[®]
- Model ways to improve your forecast and take action



ONLINE ACCESS

trsretire.com

Sign in:

First-time users

Step 1: Select "New user? Get started."

Step 2: Follow the instructions to establish a username and password.

Frequent users

Step 1: Sign in to your account by entering your username and password.

Step 2: Click on the name of the account you want to access.

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 **Manage** tab.

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.

Change future investment allocations (new contributions)

- To choose or change how new contributions will be invested, click "**Future Allocations**" under the **Manage** tab.

When you enter a change, a confirmation will be sent the following business day. Changes that are completed prior to 4 p.m. ET will be valued using the market closing unit values for that day. Changes completed after 4 p.m. ET will be valued using the market closing unit values for the following business day.

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.



TRANSAMERICA[®]



ACCESS BY PHONE

Call US: **Step 1:** Call **800-755-5801**.

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.

ONCE YOU'RE IN:

After verifying your identity, you can navigate the phone system by saying what you want to do. Here are a few examples:

- Check account balance
- Change contribution amount
- Get loan information or model a loan
- Access customer service

When you enter a change, a confirmation will be sent the following business day. Changes that are completed prior to 4 p.m. ET will be valued using the market closing unit values for that day. Changes completed after 4 p.m. ET will be valued using the market closing unit values for the following business day.

Get in touch:



CALL
800-755-5801



VISIT
trsretire.com

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