EASY ACCESS TO YOUR ACCOUNT

TRINIPLUS RETIREMENT PLAN

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

GETTING STARTED

- Click **Create an account** in the top-right corner
- On the next page, you'll be prompted to enter your full name, date of birth, social security number, and contact information
- Next, you can create a unique username, password, as well as set up your security questions
- If you've already set up your online account, click **Log In** in the top-right corner

COMPLETING YOUR PROFILE

- For first time users, click Let's **Get Started** to verify your personal information. Here, you can set up deferral elections, create an investment strategy, and review and confirm your contact information
- If you are already enrolled, review your contact email and phone number by clicking on your initials in the right top hand corner and selecting personal information. Consider adding your phone number and selecting text messages for important retirement plan reminders as well as adding an alternate email address.

ONCE YOU'RE IN

From the menu across the top, 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.

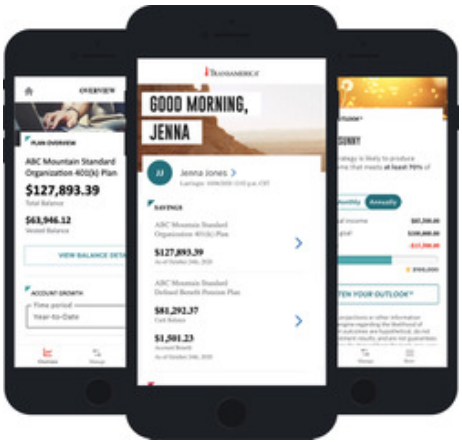
- Check account balance
- Use our *OnTrack*® tool to help you create and easily modify your retirement income strategy
- Transfer between funds
- Review investment performance
- Manage contributions and fund allocations
- Name or change a beneficiary
- Fill out the form to start the transfer of your 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 using the same credentials as the participant website
- Check your balance
- Adjust your contribution rate
- Manage your investments
- Review *Your Retirement Outlook®* personalized income analysis
- Sign up for security alerts
- Enable facial recognition or fingerprint
- ID for enhanced security



SET UP VOICE PASS 800-755-5801

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 800-755-5801.

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.

We're here to help. Schedule a free meeting with your retirement planning consultant today.

Brad Sharp
brad.sharp@transamerica.com
319-355-7474

SCHEDULE FROM YOUR PHONE
To make an appointment, scan the QR code.

Access your account online 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 Corporation (TISC), member FINRA, 440 Mamaroneck Avenue, Harrison, NY 10528. Investment advisory services are offered through Transamerica Retirement Advisors, LLC (TRA), registered investment advisor. All Transamerica companies identified are affiliated, but are not affiliated with your employer.

CP3119940R5 TT080278 06/22
© 2022 Transamerica Corporation

TRINITY HEALTH

TRANSAMERICA®