

Uploading TPA Firm Profile for Proposal purposes

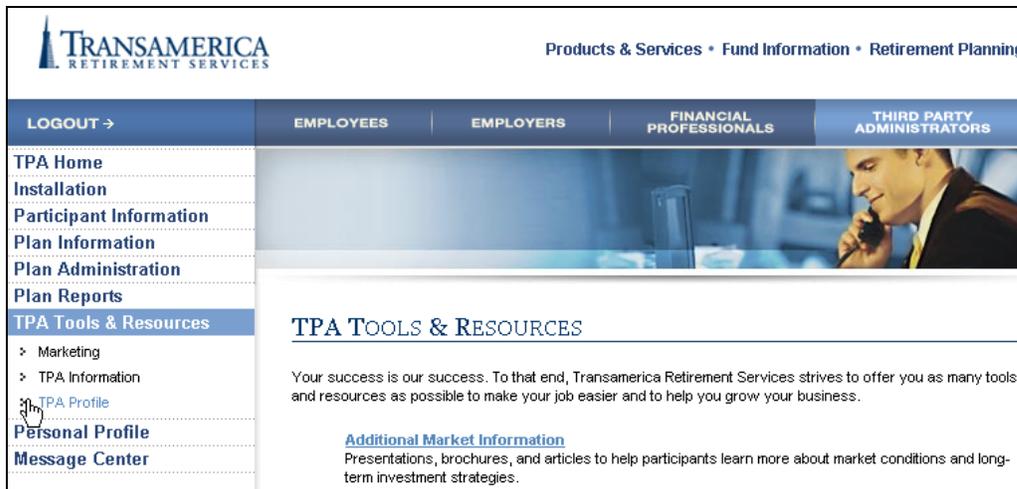
1. Log on to www.ta-retirement.com with your **TPA** Username and Password.



2. From the TPA Home Page, use the Left Navigation Bar to access the **“TPA Tools and Resources”** menu.



3. Select **“TPA Profile”** from the Left Navigation Bar.



4. In the “TPA Profile” page, scroll to locate the “**Firm Profile**” Section.

The screenshot shows the Transamerica Retirement Services website. At the top left is the logo. At the top right are navigation links: Products & Services • Fund Information • Retirement Planning. Below this is a dark blue navigation bar with tabs for LOGOUT →, EMPLOYEES, EMPLOYERS, FINANCIAL PROFESSIONALS, and THIRD PARTY ADMINISTRATORS. On the left is a vertical menu with links: TPA Home, Installation, Participant Information, Plan Information, Plan Administration, Plan Reports, TPA Tools & Resources (with sub-links for Marketing, TPA Information, TPA Profile, and Paid Fee Summary), Personal Profile, and Message Center. The main content area is titled "TPA PROFILE" and contains two paragraphs of text explaining that firm information (fees, profile, address, phone, web) can be updated here and that updates are done in real time. It also instructs users to click "Update" for each section separately.

The screenshot shows the "Firm Profile" section of the website. It has a title "→ Firm Profile" and a link "View Current Firm Profile". Below this is a "Replacement File:" label next to a text input field and a "Browse..." button. Underneath is a "Comments:" label next to a large text area with a vertical scrollbar. At the bottom of the form are two buttons: "Upload Firm Profile" and "Reset".

5. Upload your Firm Profile by clicking on the “**Browse**” button.

→ Firm Profile

[View Current Firm Profile](#)

Replacement File:

Comments:

6. Once the file has been selected, click on the “**Upload Firm Profile**” button to submit. You may also enter any comments as needed.

→ Firm Profile

[View Current Firm Profile](#)

Replacement File:

Comments:

7. You will receive a Confirmation Page; you may print a copy for your records.

TPA Tools & Resources

- Marketing
- TPA Information
- TPA Profile
 - Paid Fee Summary

Personal Profile

Message Center

TPA PROFILE - FIRM PROFILE CONFIRMATION

[Return to TPA Profile](#)

Thank you for uploading your firm profile. We will update our records with the information.

Confirmation Number:	11998
Transaction Date:	01/22/2009 - 10:55 AM PT
Submitted By:	Mary Smith
File uploaded:	C:\WINDOWS\Profiles\wramirez\Desktop\Morris Glazer.doc