

TPA Choice Election Report


Products & Services • Investment Choice Information • Retirement Planning

EMPLOYEES
EMPLOYERS
FINANCIAL PROFESSIONALS
THIRD PARTY ADMINISTRATORS

TPA Home

Installation

Participant Information

Plan Information

- ✦ Plan Details
- ✦ Document Center
- ✦ Plan Investments
- ✦ Plan Provisions
- ✦ Plan Contacts
- ✦ Service Standards

Plan Administration

Plan Reports

TPA Tools & Resources

Personal Profile

Message Center

LIVE HELP

I'm Online 

Start Chat

PLAN INFORMATION

You are currently providing administration for the following plans with Transamerica Retirement Services. Select a company from the list below to view specific plan information.

Contracts shown below with an icon to the right of the "Total Assets" column identify plans with a recent change to one or more of the investments in their line-up. To access the investment change notice sent to plan sponsors, simply click on the Plan Name and then click the "Document Center" in the left-hand navigation menu, then click the "Notices & Communications" tab.

 indicates the TPA Choice elections. Click on the icon for additional details.

 indicates a plan that utilizes our Plan Administration Service Support feature. Click on the icon for additional details.

You may click on the column header to sort in ascending or descending order. [Download Report](#) [Printable Version](#)

Company Name	Contract	Participants	PYE	Financial Advisor	Total Assets
Sample Company, Inc. A	123456-000	16	12/31	Megan Hanel	\$487,762.25 
Sample Company, Inc. B	567890-000	70	12/31	Lee Coomler	\$1,420,709.66 
Sample Company, Inc. C	678123-000	6	12/31	Braxton Bowman	\$388,295.68 
Sample Company, Inc. D	345987-000	200	12/31	Braxton Bowman	\$4,239,929.25  

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Home Insert Page Layout Formulas Data Review View Acrobat

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	A	B	C	D	E	F	G	H	I	J	K
1	Company Name	Contract Id	Sub Id	Participants	Plan Year End	Financial Advisor	Total Assets	TPA Loans	TPA Distributions	TPA Vesting	PASS Services
2	Sample Company A, Inc.	123456	0	159	31-Dec	John Smith	\$343,571.50	No	No	No	
3	Sample Company B, Inc.	789123	0	18	31-Dec	Ben Weldon	\$819,007.57	No	Yes	Yes	
4	Sample Company C, Inc.	345678	0	30	31-Dec	Tom Macky	\$1,453,453.81	No	Yes	Yes	Payroll, Enrollment, Distributions, Loans, Communications
5											