

If you would like to display your firm's website in the Document Center of Transamerica's Employers and Financial Professionals sections, please place a check mark the highlighted box as shown below.

TRANSAMERICA
RETIREMENT SERVICES

Products & Services • Investment Choice Information • Retirement Planning

EMPLOYEES EMPLOYERS FINANCIAL PROFESSIONALS THIRD PARTY ADMINISTRATORS

TPA Home
Installation
Participant Information
Plan Information
Plan Administration
Plan Reports
TPA Tools & Resources

- Education Planner
- Marketing
- DB/Cash Balance Solutions
- TPA Information
- TPA Profile
 - Paid Fee Summary
 - E-Signature Documents
- TPA Training Events
- Additional Market Information

Personal Profile
Message Center

TPA PROFILE

Firm information such as administrative fees, profile, address, telephone number and Web address may be changed below. Keeping this information up-to-date enables Transamerica to include the most current information about your firm in our customized proposal. Updates for fee and participant forms are done in real time.

Make the necessary changes to firm information and then click **Update**. Each section must be updated separately.

→ Firm Information

TPA Name: Sample TPA Firm, LLC

Primary Firm Contact:

Address 1:* 1725 S. Flag St.

Address 2: Suite 2752

Address 3:

City:* Seattle ST:* WASHINGTON ZIP:* 95246

Country:* United States

Telephone:* 2065857511 Fax:

Web address: www.sampletpa.com

Display web address to sponsors and producers in the Document Center

Update Firm Information Reset

Below is an example of how your website will display in the Document Center for all plans that you administer.

The screenshot displays the Transamerica Retirement Services website interface. At the top left is the Transamerica logo. To the right are navigation links: "Products & Services", "Investment Choice Information", and "Retirement Planning". Below this is a horizontal menu with four tabs: "EMPLOYEES", "EMPLOYERS", "FINANCIAL PROFESSIONALS", and "THIRD PARTY ADMINISTRATORS". The "EMPLOYERS" tab is selected. The main content area features a large image of a man in a blue shirt talking on a mobile phone. Below the image is the heading "DOCUMENT CENTER". Underneath, the plan details are listed: "Widgets, Inc.", "Widgets Inc. 401(k) Profit Sharing Plan", and "Contract ID: 578581-0000". A note states: "To view a document (requires the free [Adobe Reader](#)), click the corresponding link below. Your document will open in .PDF format in a separate browser." Below this note are four tabs: "Plan Documents", "Reporting & Testing", "Notices & Communications", and "Statements & Confirmations". The "Plan Documents" tab is active. A yellow callout box contains the text: "Plan Documents Supported by the TPA. This website can be used to access plan-related documents held by the TPA. www.sampletpa.com". A yellow arrow points to the URL.

TRANSAMERICA
RETIREMENT SERVICES

Products & Services • Investment Choice Information • Retirement Planning

EMPLOYEES EMPLOYERS FINANCIAL PROFESSIONALS THIRD PARTY ADMINISTRATORS

Plan Information

- › Plan Details
- › Document Center
- › Activity Statements
- › Plan Provisions
- › Plan Contacts
- › Plan Statistics
- › Service Standards

Plan Investments

Plan Administration

Plan Reports

Participant Information

Market Resource

Center

Resources

Personal Profile

Message Center

DOCUMENT CENTER

Widgets, Inc.
Widgets Inc. 401(k) Profit Sharing Plan
Contract ID: 578581-0000

To view a document (requires the free [Adobe Reader](#)), click the corresponding link below. Your document will open in .PDF format in a separate browser.

Plan Documents Reporting & Testing Notices & Communications Statements & Confirmations

Plan Documents Supported by the TPA

This website can be used to access plan-related documents held by the TPA.
www.sampletpa.com