



## New Enhancements Available January 7, 2011

### Focus: Distributions

**You gave us feedback and we listened!** Transamerica Retirement Services has made system enhancements that give Third Party Administrators a *CHOICE* when it comes to Participant Distribution processing. You can choose the level of involvement that best meets your needs.

**Do TPAs have a choice when it comes to their involvement in online Distribution Processing at Transamerica?** Yes. The TPA can either outsource the online distribution process to Transamerica or choose to be an integral part of the process. It is up to you.

**What does being involved in the Participant Distribution process mean?** This level of involvement consists of receiving notification emails, verifying vesting and approving or denying distribution requests. If you are currently not involved and now want to be, making the switch is very simple. *We recommend that you have a conversation discussing the change with the plan sponsor in advance.*

- In order to make this change, you simply log on to [www.TA-Retirement.com](http://www.TA-Retirement.com), access the Plan Information menu, select the plan you are working on and click on the Plan Provision link. Next, find the section marked Loans and Distributions. In the Distributions section of that area, please follow the steps below:
  - For the question that reads: *Do you, the TPA, want to be involved in Distribution Review and Processing?* Please select the radio button for “yes.”
  - Please click on the “Submit” button followed by the “Make Additional Updates” button.
  - Select *Plan Type and Features* from the options provided and then click “Next.”
  - Find the section marked *Special Features*.
  - Find the question that reads “*Online Distributions?*” Please select the radio button for “yes”.
  - Please be sure to click on the “Submit” and “Confirm” buttons to finalize your changes.
  - You may also contact TPAConnect<sup>SM</sup> at (877) 398-7526 or email ([tpaconnect@transamerica.com](mailto:tpaconnect@transamerica.com)) for additional assistance.

**What does outsourcing Participant Distributions to Transamerica mean?** If you want to outsource your involvement in this process, you will not receive email notifications or have the ability to update vesting prior to the distribution being processed. Online distribution requests received will only require Plan Sponsor approval. *We recommend that you have a conversation discussing the change with the plan sponsor in advance.*

- In order to make this change, you simply log on to [www.TA-Retirement.com](http://www.TA-Retirement.com), access the Plan Information menu, select the plan you are working on and click on the Plan Provision link. Next, find the section marked Loans and Distributions. In the Distributions section of that area, please follow the steps below:
  - For the question that reads: *Do you the TPA want to be involved in Distribution Review and Processing?* Please select the radio button for “no.”
  - Please be sure to click on the “*Submit*” and “*Confirm*” buttons to finalize your changes.
  - You may also contact TPAConnect<sup>SM</sup> at (877) 398-7526 or email ([tpaconnect@transamerica.com](mailto:tpaconnect@transamerica.com)) for additional assistance.

If you have any additional question or need assistance, you can contact your Development Manager or TPAConnect<sup>SM</sup> at (877) 398-7526 or email [tpaconnect@transamerica.com](mailto:tpaconnect@transamerica.com).

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TPAConnect<sup>SM</sup> is available at (877) 398-7526 Monday through Friday from 9 a.m. through 8 p.m. Eastern Time.