Transamerica[SM]

Your rollover checklist

Four simple steps to combine your accounts

Step 1

Initiate rollover

- ☐ Contact the company handling your retirement account. They may require you to complete a distribution form or other documentation.
- ☐ Be prepared to provide:
  - The type of account with Transamerica (401(k), 403(b))
  - Your Transamerica account number
  - A mailing address to send your check
- ☐ Make the check payable to Transamerica, for benefit of (FBO) your first and last name.
  - If possible, have the company mail the check directly to Transamerica.
  - If the check is mailed to you, please send it to Transamerica. **Do not deposit it into your personal account**, as this could have tax consequences.

Step 2

Complete & sign form

- ☐ The Incoming Rollover Deposit form is required to deposit your rollover funds into your current retirement account at Transamerica.
- ☐ Fill out the highlighted areas and sign the form.
- ☐ Obtain your plan administrator's signature if there's a line requiring it on the form.
- ☐ Call **800-275-8714** if you have questions, or contact your Transamerica financial professional directly.

Step 3

Send to Transamerica

- ☐ Return the Incoming Rollover Deposit form to Transamerica using one of the following methods:
  - DocuSign (if applicable)
  - Upload to your Transamerica retirement account using the instructions on the next page
  - Traditional mail (along with the check, if applicable)
- ☐ If a check was sent directly to you, mail it to Transamerica.

Note: You can find the mailing address in the mailing and wiring instructions section of your form.

Step 4

Funds deposited

- ☐ Once Transamerica receives your form and check (and we've confirmed everything is completed accurately), the funds will be visible in your account within four business days.
- ☐ You will receive a confirmation when your funds are deposited. **Log in** to your account to verify the deposit.

Please note, the timeline for combining your retirement accounts can vary depending on your prior plan provider, how they transfer your funds, and how you return your form. Also, remember to keep a copy of all your forms for your records, and reach out to your Transamerica financial professional at 800-275-8714 if you have any questions about the rollover process.

Upload your rollover deposit form with ease

Upload your form right from your mobile phone or computer in minutes. It's easy! Just follow these steps and you're on your way.

Mobile uploads

Watch this short **video** to see how you can quickly upload your completed Incoming Rollover Deposit form via the Transamerica mobile app.

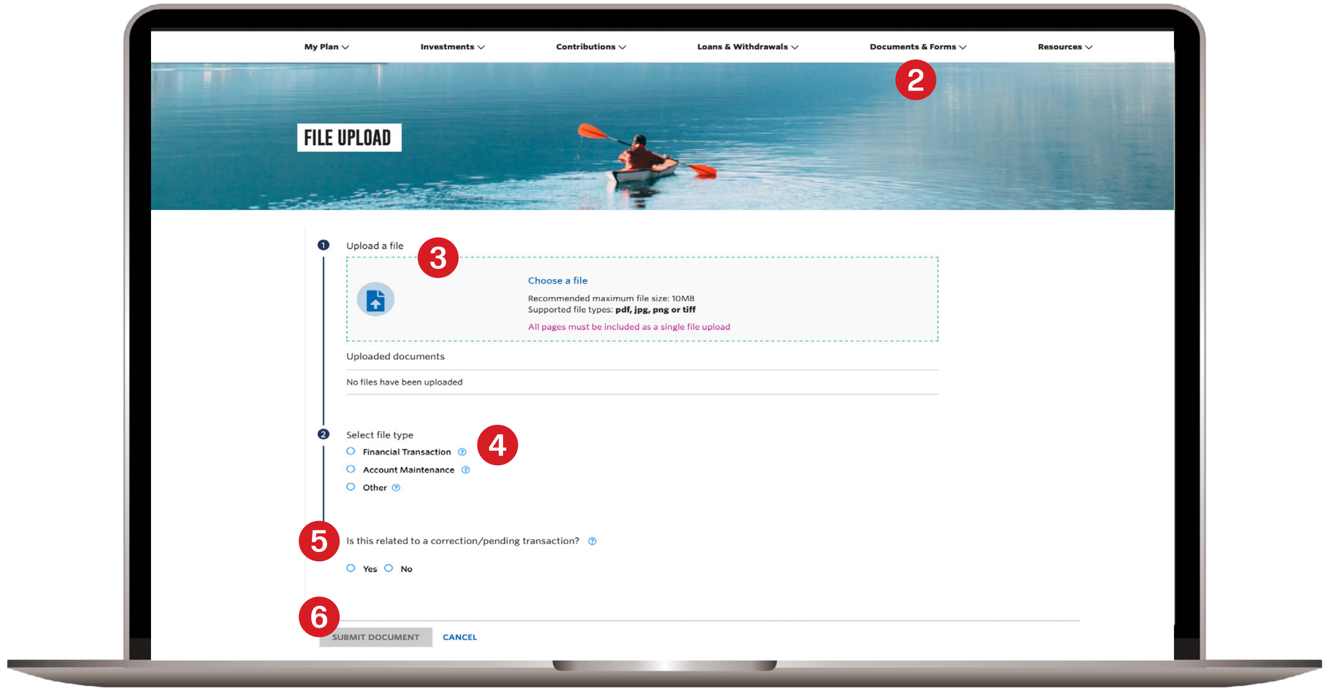
File uploads

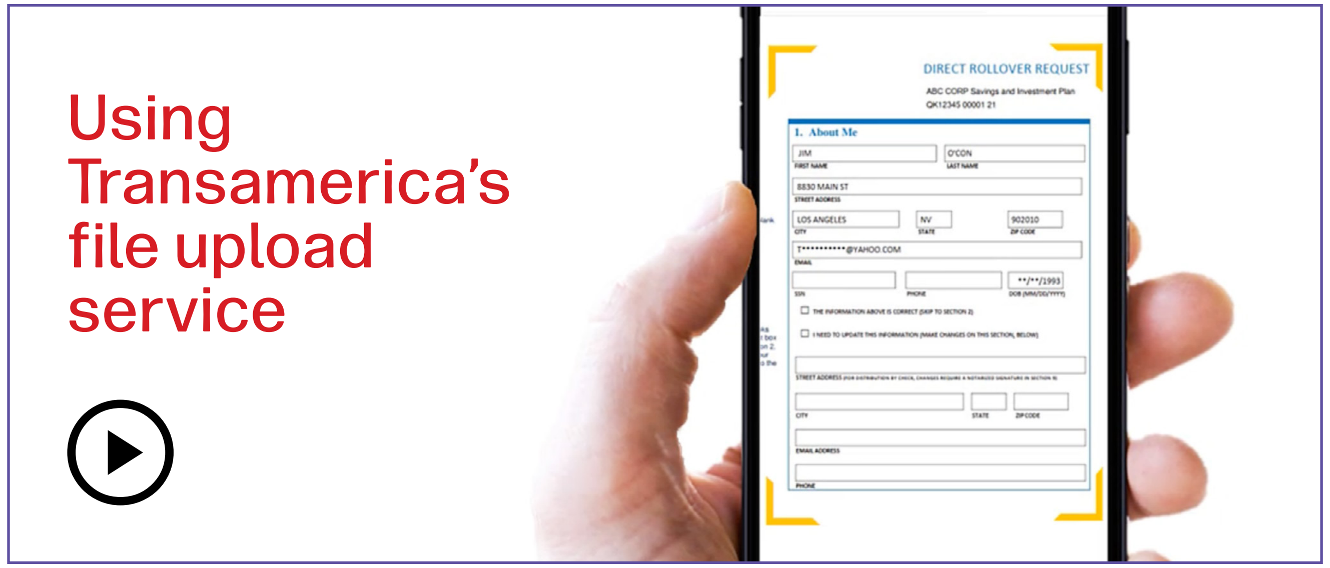
To start, download the Rollover Deposit form sent to you by your rollover specialist. Print, fill in the required information, and scan and save it as a PDF, JPG, PNG, or TIFF. Be sure to save multi-page documents in a single file; see below for more information.

Next

1. **Log in** to your Transamerica retirement account.
2. Under **Documents & Forms** in the top navigation, click **File Upload**.
3. Choose the file that contains your completed form to upload.
4. Select the file type.
5. Check **Yes** if the upload is related to a correction or a pending transaction, otherwise check **No**.
6. Click **Submit Document**.

That's it! The form has been transferred and received for processing. We will send a confirmation that the process has been successfully completed.





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.

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Tips & best practices for computer file uploads

Multi-page documents

Save multi-page documents as one file rather than saving each page separately. If you're unable to save multiple pages as one document, include your name, Social Security number, and account number on each page so we know the forms belong to you.

Timing

It may take up to 15 minutes for uploaded documents to be added to your account. If you don't see your documents within an hour of uploading, try again following the directions here, or use another method to submit.

File names

When naming the file, do not include a period (.) because doing so will cause problems for the upload service. Instead, use an underscore, like this:

- ✓ withdrawal_form.jpg
- ⃠ withdrawal.form.jpg

Transamerica℠