INTRODUCING THE TRANSAMERICA CUSTOMER PORTAL

EASY START GUIDE

Creating an account is simple! We'll walk you through a few steps to get you set up.

GETTING STARTED

Establishing your online profile is key in managing your annuity on a regular basis. Our convenient and secure website provides the 24/7 access you need.

CREATE ACCOUNT

1. Go to transamerica.com and click CREATE ACCOUNT
2. Click Individual
3. Click Annuities
4. Starting on the Create Your Account Page, follow these steps:
   - Verify your identity by entering your first and last name, date of birth, and Social Security number without dashes
   - Enter your primary email address
   - Optional – enter your cell phone number
   - Create a username and password
   - Click NEXT
   - Choose whether you want your one-time passcode to be sent as a text message or as an email
   - Enter the one-time passcode onto the website
   - Optional – Enter an alternate email address
   - Set up 3 security questions with unique answers
   - Click NEXT
   - Check the boxes indicating agreement with the Terms and Conditions as well as the Consent to Do Business Electronically
   - Click FINISH AND GO TO MY ACCOUNT

Website Technical Support

Monday through Friday, 9 a.m. – 6 p.m. ET

CALL
866-301-2473

RETURNING VISITORS

After you create an account, the shorter login process will let you monitor activity in just a few clicks. You'll be in control. It's that easy to stay connected to your annuity's daily performance.

LOG IN

Log in faster by going directly through our annuity portal.

1. Go to secure.transamerica.com
2. On the Login page, enter your username and password
3. Click LOGIN
4. If you've enabled multifactor authentication, you'll be asked to enter a one-time passcode and answer one of your security questions
5. Find the policy you want to review and select DETAILS

YOU'RE ONLINE

Now that you've logged in, you will see the **My Products** page. Scroll down the **Account Details** page to review important information such as **Policy Value** and **Death Benefits**. To review Beneficiaries, go to the **Policy Overview** page.

Looking for something specific? To access your Transaction History click **Transaction History**. To locate **Fund Performance** and **Subaccount Values**, click the drop down menu titled **Manage Allocations**.

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Insurance / Investments / Retirement

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