Uploading TPA Firm Profile for Proposal purposes

1. Log on to <u>www.ta-retirement.com</u> with your <u>**TPA**</u> Username and Password.

TRANSAMERICA RETIREMENT SERVICES	*	Products & Services • Fund Info	rmation * Retirement Planning
→ Your Account: LOGIN	EMPLOYEES EMPLOYE	RS FINANCIAL PROFESSIONALS	THIRD PARTY ADMINISTRATORS
Username: Password: Having trouble logging in? Forgot your username? Forgot your password? First time user? Register here.	Transamerica. Master Retir POWE	ement. sm R CHOICE FREEDOM	Ach

2. From the TPA Home Page, use the Left Navigation Bar to access the "**TPA Tools and Resources**" menu.

Products & Services • Fund Information • Reti		tion • Retirement Planning		
LOGOUT >	EMPLOYEES	EMPLOYERS	FINANCIAL PROFESSIONALS	THIRD PARTY ADMINISTRATORS
TPA Home				
Installation			and the second s	
Participant Information				
Plan Information			1	
Plan Administration			- 10	
Plan Reports				
TPA Tools & Resources	TPA HOME			
Personal Profile				
Message Center	Welcome Mary Smith.			

3. Select **"TPA Profile"** from the Left Navigation Bar.

TRANSAMERICA RETIREMENT SERVICES		Product	ts & Services • Fund Informa	ation • Retirement Planning
LOGOUT→	EMPLOYEES	EMPLOYERS	FINANCIAL PROFESSIONALS	THIRD PARTY ADMINISTRATORS
TPA Home		A CONTRACTOR OF		a 2
Installation			100	- 42 /
Participant Information				
Plan Information				
Plan Administration				
Plan Reports				
TPA Tools & Resources	TPA TOOLS	& Resources		
> Marketing				
> TPA Information	Your success is our	success. To that end, Tran	samerica Retireme⊓t Services str	ives to offer you as many tools
ក្រកPA Profile	and resources as po	issible to make your job eas	ier and to help you grow your bu:	siness.
Personal Profile	Additional	Market Information		
Message Center	Presentation term investm	s, brochures, and articles to ent strategies.	o help participants learn more abo	out market conditions and long-

4. In the "TPA Profile" page, scroll to locate the "**Firm Profile**" Section.

TRANSAMERICA RETIREMENT SERVICES	Products & Services • Fund Information • Retirement Planning			
LOGOUT→	EMPLOYEES	EMPLOYERS	FINANCIAL PROFESSIONALS	THIRD PARTY ADMINISTRATORS
TPA Home				
Installation			and the second s	
Participant Information				
Plan Information			1	
Plan Administration			- 100	
Plan Reports				
TPA Tools & Resources	TPA PROFIL	E		
> Marketing				
> TPA Information	Firm information such	as administrative fees, pro	ofile, address, telephone number a	and Web address may be
> TPA Profile	changed below. Keep	bing this information up-to-c	late enables Transamerica to inclu	ude the most current
Paid Fee Summary	time.	ir firmini our customized pro	oposal. Opdates for fee and partic	apant forms are done in real
Personal Profile				
Message Center	Make the necessary (separately,	changes to firm information	and then click Update . Each sect	tion must be updated

→ Firm Profile		
View Current Firm Profile		
Replacement File:	Browse	
Comments:		A.
	Upload Firm Profile	Reset



5. Upload your Firm Profile by clicking on the **"Browse"** button.

→ Firm Profile		
View Current Firm Profile		
Replacement File:	Browse	
Comments:		×
	Upload Firm Profile	Reset

6. Once the file has been selected, click on the **"Upload Firm Profile"** button to submit. You may also enter any comments as needed.

→ Firm Profile		
View Current Firm Profile		
Replacement File:	C:\WINDOWS\Profiles\wra Browse	
Comments:	Enclosed is our TPA Firm Profile	*
	Upload Firm Profile	Reset

7. You will receive a Confirmation Page; you may print a copy for your records.

TPA Tools & Resources Marketing	TPA PROFILE -	FIRM PROFILE CONFIRMATION
 TPA Information TPA Profile Paid Fee Summary 		Return to TPA Profile
Personal Profile	Thank you for uploading yo	ur firm profile. We will update our records with the information.
Message Center	Confirmation Number:	11998
	Transaction Date:	01/22/2009 - 10:55 AM PT
	Submitted By:	Mary Smith
	File uploaded:	C:\WINDOWS\Profiles\wramirez\Desktop\Morris Glazer.doc
		Print Page