

EASY ACCESS TO YOUR ACCOUNT



Your plan website is the first stop for everything you need to know about your account. Sign in to your account to get information about your retirement plan benefits and learn more about saving for your future.

You can review the current status of your account, make changes, and access tools to help you personalize your retirement strategy.



Download the My TRSRetire app from the App Store or Google Play

With the My TRSRetire app, connecting with your retirement plan has never been easier.

- View your account balance and rate of return
- Know *Your Retirement Outlook*®
- Model ways to improve your forecast and take action



ONLINE ACCESS

my.trsretire.com

Sign in:

First-time users

Step 1: Select “New user? Get started.”

Step 2: Follow the instructions to establish a username and password.

Frequent users

Step 1: Sign in to your account by entering your username and password.

Step 2: Click on the name of the account you want to access.

ONCE YOU'RE IN:

From the left-hand menu, scroll over the five tabs – **Home**, **Review**, **Manage**, **Are You OnTrack**®, and **Resource Center** – and select an option from the drop-down lists.

Check account balance

- Balance automatically appears on the overview page.
- For account balance by fund, click “**Balance**.”

Review investment performance

- To get performance and fee details for all the funds in your plan, click “**Fund and Fee Information**” under the **Manage** tab.

Change contribution amount

- To choose or change your contribution amount and sign up for annual, automatic increases, click “**Contributions**” under the **Manage** tab.

You should evaluate your ability to continue the auto-increase service in the event of a prolonged market decline, unexpected expenses, or an unforeseeable emergency.

Change future investment allocations (new contributions)

- To choose or change how new contributions will be invested, click “**Future Allocations**” under the **Manage** tab.

When you enter a change, a confirmation will be sent the following business day. Changes that are completed prior to 4 p.m. ET will be valued using the market closing unit values for that day. Changes completed after 4 p.m. ET will be valued using the market closing unit values for the following business day.

Transfer Between Investment Options (current assets)

- To transfer balances between individual or groups of funds, click “**Transfers**” under the **Manage** tab.
- To change your overall investment mix, click “**Current Investments**” under the **Manage** tab.

Get loan details

- To review loan status and get payoff details for current loans (if applicable), click “**Loan Details**” under the **Review** tab.

Name or change a beneficiary

- To name or change your beneficiary, click “**Beneficiaries**” under the **Home** tab.

Please note that if you are married and designate someone other than your spouse as a “primary” beneficiary, spousal consent may be required.



TRANSAMERICA®



ACCESS BY PHONE

Call US:

First-time Callers

Step 1: Call 800-755-5801.

Step 2: Enter your Social Security number.

Step 3: Follow the prompts for creating your Personal Identification Number (PIN).

Frequent Callers

Step 1: Call 800-755-5801.

Step 2: Enter or say your Social Security number.

Step 3: Choose the account you wish to access.

Step 4: Enter or say your PIN.

ONCE YOU'RE IN:

Check account balance

- Account balance automatically offered.
- For account balance by fund, say "Account information," then "Balances."

Review investment performance

- Say "Hear account information."
- Say "Fund information," then "Performance."

Change contribution amount

- Say "Change my account."
- Say "Contribution amount."
- Provide updates to contribution amount.

Change future investment allocations (new contributions)

- Say "Change my account."
- Say "Future allocations."
- Provide updates to investment allocation.

Please note that this allocation change impacts only your future contributions.

When you enter a change, a confirmation will be sent the following business day. Changes that are completed prior to 4 p.m. ET will be valued using the market closing unit values for that day. Changes completed after 4 p.m. ET will be valued using the market closing unit values for the following business day.

Transfer between investment options (current assets)

- Say "Change my account."
- Say "Transfer current assets."
- Provide transfer information.

Please note that changing current allocations does not change how your future contributions will be invested.

Get loan details

- Say "Get loan information."
- Choose to either get information about a new loan or your personal loan history.

Customer service

- Say "Speak to a counselor."

Get in touch:



my.trsretire.com



call us at 800-755-5801

to email us, click on the **Contact** tab.

This material was prepared for general distribution. It is being provided for informational purposes only and should not be viewed as an investment recommendation. If you need advice regarding your particular investment needs, contact your financial professional.

