

After setting up your login credentials you will be on your personal dashboard. Select DETAILS of the plan you want to view. Across the top is a list of accessible information and forms. To change plans click Financial Overview at the top of the screen.

Some of the frequently used options are **Contributions** and **Withdrawals**. Which can be initiated by clicking on the dropdown menu.

On the My Plan tab you will see the main topics Account Overview, Activity Summary and Details, Beneficiaries, Rollovers, Balance, and Summary Plan Documents.

Select Beneficiaries to set up your beneficiaries. If you are updating your beneficiaries, scroll to the bottom of the page and click the ADD/UPDATE button and select the change you are wanting on each beneficiary; Edit, Delete or Make Contingent. **Be sure to click Submit when done.**

The screenshot shows the Transamerica Financial Overview dashboard. The top navigation bar includes the Transamerica logo, a home icon, 'Financial Overview', a help icon, the phone number '800-755-5801', and a user profile icon labeled 'SF'. Below the navigation bar are tabs for 'My Plan', 'Investments', 'Contributions', 'Loans & Withdrawals', 'Documents & Forms', and 'Resources'. The main content area features a large banner with a kayaker on water. On the left of the banner is the word 'BENEFICIARIES' in a white box. On the right is a white box containing the Transamerica logo, 'ARCHDIOCESAN 403(B) SAVINGS PLAN', and 'Account #TTO69299-00001'. Below the banner is the section 'BENEFICIARIES - OVERVIEW' with a sub-header 'Primary Beneficiaries' and a blue plus icon. A small note below reads: 'Review and update your beneficiaries whenever an important change occurs in your life. This simple but critical step ensures that if you should die, your account assets will go directly where you wish. Please note: If you recently added or submitted updates to your beneficiary designations via a paper form, the updates will appear on this page as soon as they are received and processed.'

On the Documents & Forms tab you will find various forms to choose from. Select **Contributions** for the Incoming Rollover Request form needed to rollover your account from a previous employer. Select **Distributions** to view the options available to participants.

The screenshot shows the Transamerica Financial Overview dashboard with the 'Documents & Forms' tab selected. The navigation bar and banner are identical to the previous screenshot. The main content area features a large banner with a kayaker on water. On the left of the banner is the word 'FORMS' in a white box. On the right is a white box containing the Transamerica logo, 'ARCHDIOCESAN 403(B) SAVINGS PLAN', and 'Account #TTO69299-00001'. Below the banner is a section with the heading 'Choose a category to begin. Be sure to read the instructions on each form before completing. Do not email forms, they must be submitted through regular mail or fax, if applicable. Please note that forms listed below have been provided for your convenience. Forms may or may not pertain to your situation.' Below this heading are four radio button options: 'BENEFICIARY', 'CONTRIBUTION', 'DISTRIBUTION', and 'PARTICIPANT INFORMATION'. The 'BENEFICIARY' option is selected.