

Retirement Healthcare Funding 457(b) and 401(a)

NPPFA Benefits

1701 E. Lake Ave., Ste. 400

Glenview, IL 60025

866-994-6312 (Main)

service@nppfabenefits.org

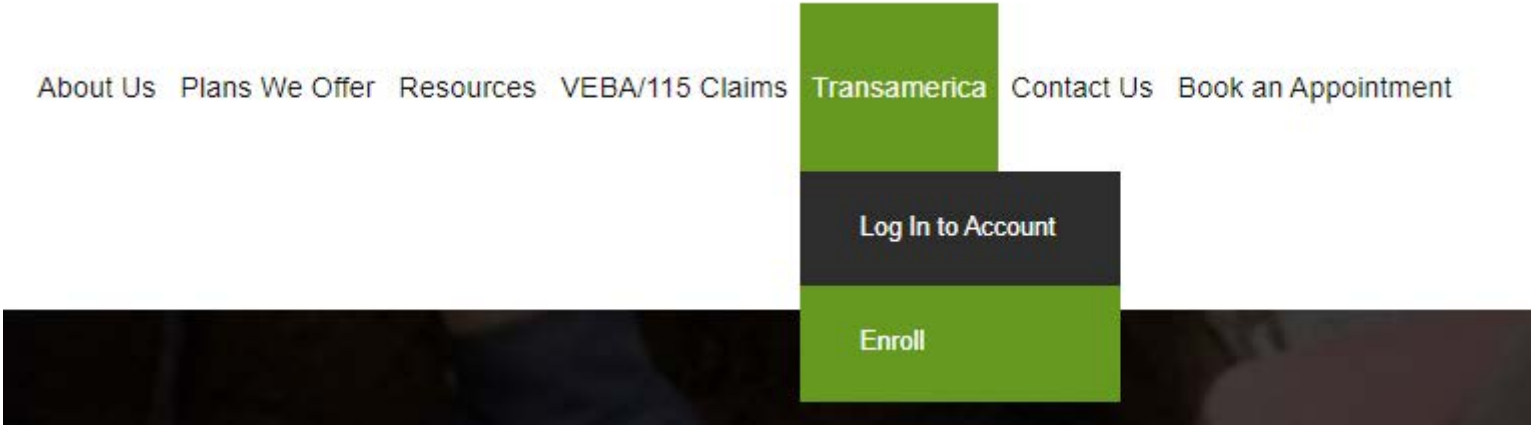
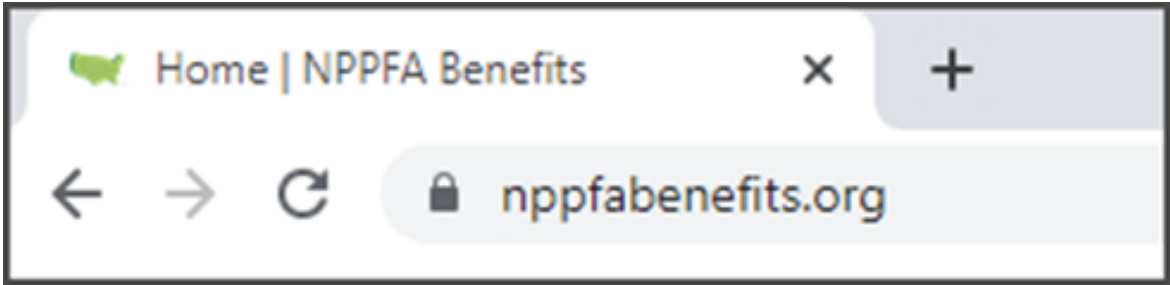
www.nppfabenefits.org



Step by Step Guide

For Setting Up Your Online Account


Accessing Your Retirement Account Online



Complete All Fields

First let's verify your identity


For your protection, we need to collect some information for verification purposes
Information collected is subject to our [Online Privacy Statement](#)


 Your full name *

* Required Fields

First Name


Last Name

 Date of birth *

 Social security # (SSN) *


Date of birth

Social Security #

 Mobile Number


Phone number

Providing mobile phone number here is the quickest way to verify your identity. Standard text charges may apply. Check with your cell phone provider for details.

 Email address *

Email address

Transamerica will never share or use your email for marketing purposes. You will receive notifications about status changes to your online account.

 Address of Residence *

Address Line 1

Address Line 2

City

State

Zip

Help Us Protect Your Information

Please enter the CAPTCHA below to continue the verification process.



Type the moving characters *

CONTINUE

Complete All Fields

Great, now we can set up your online profile

Don't worry, these can be changed later if needed

* Required Fields

Create a username

Username

Set a password

Password

Re-type password

Provide 3 security question and answers

Security question 1

Answer to question 1

Security question 2

Answer to question 2

Security question 3

Answer to question 3

Please read and agree to our Terms of Use and Consent to Do Business Electronically

TERMS OF USE



I acknowledge and agree to the Terms of Use.

ECONSENT



I acknowledge and agree to the Consent To Do Business Electronically.

GO BACK

CONTINUE

Enter Your New
Username And
Password

Access your retirement account

Please login using your username and password



You have successfully created your online account. Please login to configure your retirement plan.



Username

Xxxxxxxx

[FORGOT USERNAME?](#)

Password

[FORGOT PASSWORD?](#)

LOGIN

Need to Register?

[CREATE YOUR ACCOUNT →](#)

Choose Validation Method

Unrecognized device

We'll send a security validation code to your mobile device or your email address

How would you like to receive your validation code?

- ☒ Send code to my phone at (***)-***-7890
- ☐ Send code to my email at m****@email.com

SUBMIT

Enter Code

Security validation code

Check your email to find this 6-digit security code



For your protection, we will temporarily restrict access to your account. A security validation code was sent to [(***)-***-7890]. To verify access, enter the code you received within this browser window. Closing this window will require you to start the process over.

Please provide the security validation code below:

☐ This is a private device. Make my login easier next time.

Note that codes can take a few minutes to arrive. If you haven't received your code, check spam filter or click to [re-send code](#). Internal verification code: 2996.

SUBMIT

My Transamerica Products

**Click "SETUP" next to
your applicable plan**

RETIREMENT PLANS

457(b) →

VEBA/115 Trust →

Plan Name	Plan Number	Plan Balance	
The Wise Choice for Public Employees	PE61743 00003	\$0.00	SETUP
Retiree Healthcare Funding Plan	VB98198 00001	\$0.00	SETUP

Create Your Profile

Complete All Fields

Address

Non-U.S. Address

Street Name

4332 Edgewood Road

Street Name 2

City

White Plains

State

WY

Zip

11111

Phone

Phone

123-456-7890

Ext

Type

Daytime

☐

Non-U.S. Number

Yes, use this number to get my transaction or account updates by:

☐

Text

☐

Call/Voicemail

Please note: By checking the "text" box, you consent to receive notifications about status changes on your account.

Email

Complete All
Fields

Email address on file

testdata@ddol.test

In case you change jobs, we recommend you use your personal email so we can remain in contact. Please add **edocuments@transamerica.com** to your safe sender list to ensure you receive email alerts.

Additional Information

Gender



Male



Female

\$ Annual salary

[Why do we need this?](#) +

Profile

Contributions & Investments

Review

Confirmation



NEXT

Contribution
Elections Only
Applies to the
457(b) Deferred
Compensation
Plan.

Elections

Contribution Elections

ELECT YOUR CONTRIBUTIONS

Pre Tax 457(b)

Regular Contribution

Roth 457(b) Post Tax

Regular Contribution

Totals for Contribution Group

Regular Contribution

If you would like to make other types of contributions, select **More Contribution Options**.

Click Here

MORE CONTRIBUTION OPTIONS

Contributions: 1 of 2


You can choose to contribute a flat \$ amount per pay period.

Contributions can pre-tax, Roth (after-tax) or any combination of both.

Or (see next page)

Contributions

Contribution Elections
Flat \$ Amount


Pretax vs.
Roth

This will be reported to your employer the first business day after January 6, 2022.

You are eligible to contribute an additional \$6,500 to your retirement plan this year. To take advantage of this additional catch-up contribution limit, your pre-tax contributions and/or Roth contributions will automatically continue once you hit the IRS 402(g) limit of \$20500 for 2022. Use the [Catch Up contribution worksheet](#) to learn more.

All amounts are *per pay period*. Enter amounts in: ☐ % ☒ \$

Min/Max Contribution:	1.00% - 100.00% combined calculate your min/max
Pre Tax 457(b)	
Regular Contribution	\$ 394
Roth 457(b) Post Tax	
Regular Contribution	\$ 394
Totals for Contribution Group	
Regular Contribution	\$788





Would you like to calculate your estimated paycheck deduction?

[CALCULATE](#)

[CANCEL](#)

Page 1 of 3

How This Could Affect Your Retirement Outlook®

 Rainy  Cloudy  Partly Sunny  Sunny

[RE-CALCULATE](#)

Click "Continue"

[CONTINUE](#)


Contributions: 2 of 2

You can choose to contribute
a % per pay period.

Contributions can pre-tax,
Roth (after-tax) or any
combination of both.

Contributions

Contribution Elections
% of Pay


Pretax vs.
Roth

This will be reported to your employer the first business day after January 6, 2022.

You are eligible to contribute an additional \$6,500 to your retirement plan this year. To take advantage of this additional catch-up contribution limit, your pre-tax contributions and/or Roth contributions will automatically continue once you hit the IRS 402(g) limit of \$20500 for 2022. Use the [Catch-Up contribution worksheet](#) to learn more.

All amounts are *per pay period*.

Enter amounts in: **%** \$

Min/Max Contribution: 1.00% - 100.00% combined	
Pre Tax 457(b)	
Regular Contribution	<input type="text" value="5"/> %
Roth 457(b) Post Tax	
Regular Contribution	<input type="text" value="5"/> %
Totals for Contribution Group	
Regular Contribution	10%





Would you like to calculate your estimated paycheck deduction?

CALCULATE

CANCEL

Page 1 of 3

How This Could Affect Your Retirement Outlook®

 Rainy  Cloudy  Partly Sunny  Sunny

RE-CALCULATE

Click "Continue"

CONTINUE

Once you have reviewed your contribution elections you can “Submit”

Contributions (Review and Submit)

Please review your elections below and click Submit to complete your request.

	If you chose % of pay	If you chose Flat \$ Amount
Pre Tax 457(b)		
Regular Contribution	5%	\$394
Roth 457(b) Post Tax		
Regular Contribution	5%	\$394
Totals for Contribution Group		
Regular Contribution	10%	\$788

Contribution Review

BACK

CANCEL

Page 2 of 3

SUBMIT

Contribution Confirmation Page

Contributions (Confirmation)

	If you chose % of pay	If you chose Flat \$ Amount
Pre Tax 457(b)		
Regular Contribution	5%	\$394
Roth 457(b) Post Tax		
Regular Contribution	5%	\$394
Totals for Contribution Group		
Regular Contribution	10%	\$788

Contribution Confirmation

Page 3 of 3

PRINT

Investment Elections

SELECT YOUR INVESTMENT STRATEGY ?

Your contributions will be invested in the fund(s) below. For additional options, select **More Investment Options**.

Fund	Allocation
T. Rowe Price Retirement 2040 Adv	100.00%

Note: Click a fund name for detailed information about the fund.

Unless you change this investment strategy, your contributions will be automatically invested as shown.

[MORE INVESTMENT OPTIONS](#)



Plan Information

You may review information about your plan's investments, associated fees, and documents.

Profile

Elections

Review

Confirmation

NEXT

Investment
Options apply to
both the 457(b)
and VEBA/115
Trust Retirement
Healthcare
Funding Plan

More Investment Strategies

PortfolioXpress®

Diversity among the funds in your plan based on your years to retirement and risk preference, then maintain and rebalance your mix—automatically.

[LEARN MORE](#)

Do it Yourself

Create your own investment mix using the core funds available in your plan. These funds offer flexibility for both new and experienced investors.

[LEARN MORE](#)

PortfolioXpress® Legal Disclosure

As you approach retirement age, risk should be a consideration in your investment mix. When you first start investing, you can choose a mix that has more risk. As you get older you may want to adjust this mix for less risk and more stability.

i PortfolioXpress® automatically invests and rebalances your account across the funds in your retirement plan based on an asset allocation strategy tailored to your years to retirement. This service enables you to model different savings and investment strategies that can be "personalized" based on your total financial picture.

Enter year or use arrows to increment years.

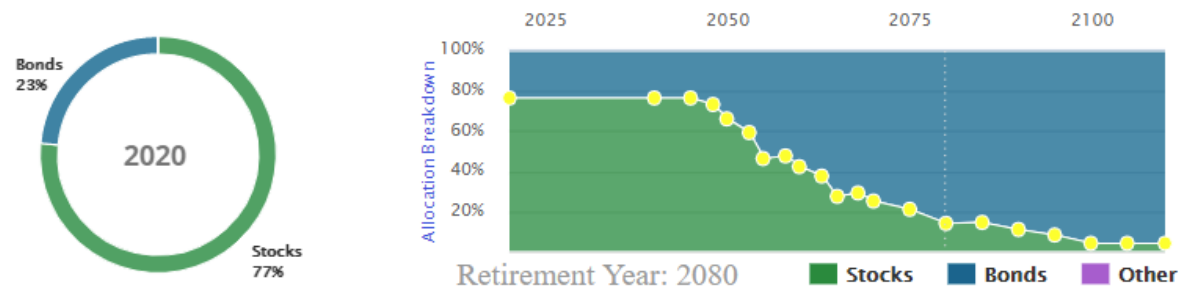
Enter Retire Year

2039



PortfolioXpress® assigns you to a series of portfolios based on assumptions consistent with a typical investor who is retiring in the same year as you. To move to a more aggressive series of portfolios, increase your retirement date by 10 years. To move to a more conservative series of portfolios, decrease your retirement date by 10 years.

i The following graph shows how your investment mix will gradually change as you age. Rollover over the graph dots below to see how your investment mix changes over time. View more detailed information on the PortfolioXpress® mixes for your plan.

[CONTINUE](#)

Enter percentages as whole numbers; percentages must total 100%.

Before choosing your investment funds, you may want to review Fund and Fee Information in the Review tab.

ALL CONTRIBUTIONS	Current	New
Short Bonds/Stable/MMkt		
PIMCO Total Return Fund	20%	<input type="text" value="20"/>
Janus Advisor Global Fund	0%	<input type="text" value="0"/>
Stable Pooled Fund	0%	<input type="text" value="0"/>
Interm./Long-Term Bonds		
Vanguard Total Market Index Ad	20%	<input type="text" value="20"/>
Metropolitan We Return Bond M	0%	<input type="text" value="0"/>
Aggressive Bonds		
MainStay High Y Corporate Bond	20%	<input type="text" value="20"/>
Large-Cap Stocks		
JP Morgan Large A	0%	<input type="text" value="0"/>
Vanguard 500 In Admiral	0%	<input type="text" value="0"/>
American Funds Fundamental Inv	0%	<input type="text" value="0"/>
American Funds Mutual A	0%	<input type="text" value="0"/>

Small/Mid-Cap Stocks		
Columbia Mid Ca	20%	<input type="text" value="20"/>
International Stocks		
American Funds EuroPacific Gr	20%	<input type="text" value="20"/>
Multi-Asset/Other		
T. Rowe Price Retirement 2040 Adv	0%	<input type="text" value="0"/>
T. Rowe Price Retirement 2030 Adv	0%	<input type="text" value="0"/>
T. Rowe Price Retirement 2020 Adv	0%	<input type="text" value="0"/>
T. Rowe Price Retirement 2010 Adv	0%	<input type="text" value="0"/>
Personal Choice	0%	<input type="text" value="0"/>
American Funds American Balanced R3	0%	<input type="text" value="0"/>
Oakmark Equity	0%	<input type="text" value="0"/>

More Investment Strategies

PortfolioXpress®

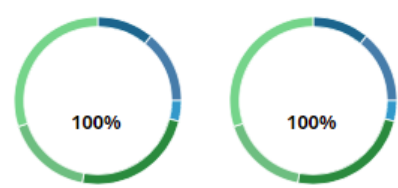
Diversity among the funds in your plan based on your years to retirement and risk preference, then maintain and rebalance your mix—automatically.

LEARN MORE

Do it Yourself

Create your own investment mix using the core funds available in your plan. These funds offer flexibility for both new and experienced investors.


LEARN MORE

	Current	New
Short Bonds/Stable/MMkt	20%	20%
Interm./Long-Term Bonds	20%	20%
Aggressive Bonds	20%	20%
Large-Cap Stocks	0%	0%
Small/Mid-Cap Stocks	20%	20%
International Stocks	20%	20%
Multi-Asset/Other	0%	0%
		
Total	(Must equal 100%)	100%

CANCEL RESET

CONTINUE

Select the Fund Name to view specific fund information in PDF format. Help with PDFs

 **Plan Information**
You may review information about your plan's investments, associated fees, and documents.

Profile

Elections

Review

Confirmation

NEXT

Review & Save

Please review your elections below and click continue to complete your request.

Profile

Elections

Review

Confirmation

BACK

SAVE

AGREEMENT


Investments are not guaranteed. I acknowledge that the investment return and principal value of these investments may fluctuate, so that my units/shares may be worth more or less than the original cost.

I authorize Transamerica to accept my telephone and internet requests for transfers and allocation changes for my account. I agree to the recording by Transamerica of these telephone conversations and internet transactions. I understand that Transamerica will not be responsible for the authenticity of telephone and internet instructions, when acting upon such instructions believed to be genuine.

I hereby consent to receiving and have received a prospectus for any registered investment funds available under the plan by means of www.transamerica.com. I further acknowledge that I am able to access these prospectuses via the website. Paper versions of the prospectuses can be ordered free of charge, both now and in the future, by calling 800-755-5801.

I certify under penalties of perjury that my Social Security Number and all other information provided on this enrollment application is correct.

I authorize Transamerica to process this electronic enrollment application in accordance with my instructions herein and I agree to notify Transamerica promptly of any discrepancies in the enrollment information.


 Selecting **Agree and Continue** means you agree to abide by all the terms of the agreement that apply to you.

DECLINE

PRINT

AGREE AND CONTINUE

Account Setup Confirmation

 Congratulations! You have successfully completed your account setup.

SETUP DETAILS

GO TO YOUR ACCOUNT

Home

Review

Manage

Are You OnTrack®?

Resource Center

Help

Contact Us
800-755-5801

Welcome Max Saver | Last sign-in: May 7, 2021 | 3:56 PM CST

ABC Organization Plan



Account# QA0000 00001

Monitoring the markets:

Check out Transamerica's insight on current world and market events. [Learn more](#)

LATEST STATEMENT

AT-A-GLANCE

As of May 7, 2021

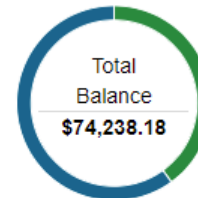
Balances

By Asset Class

By Contributions

\$ %

Rate of Return*



Stocks	\$44,542.91
Bonds	\$29,695.27
Multi-Asset/Other	\$0.00
Total	\$74,238.18
Vested Total	\$51,966.73

Year to Date 3.5%
(01/01/2021 to 5/7/2021)

*Calculates the percentage change of your account balance by weighting all activity included in the time period measured. It includes your investment earnings during the period and is net of plan fees and credits. Indicated returns are cumulative for all periods shown.

BALANCE DETAILS

ACTIVITY DETAILS

Trouble Accessing Your Account?

Financial Transactions & Account Inquiries

Please note: Certain requests cannot be made through e-mail. If you would like to make an account transaction, please call 800-755-5801 to speak with a representative. If you have lost or forgotten your password, or you need your password reset, you must call 877-348-3365 for assistance. Representatives are available Monday through Friday 8:00 a.m. to 9:00 p.m. ET.

General or Technical Information & Questions

For questions about our web site or to report a technical problem, please use our email form below.

Questions? Contact Transamerica @ 800-755-5801

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Investment Disclosures:

