TRANSAMERICA

DIRECT ROLLOVER REQUEST

Is this document for me?

You should follow these instructions when:

You need to request a direct rollover to an eligible plan (including an IRA).

Certain transactions may require additional documentation. Please call us if:

- There is any change to your mailing address
- You are requesting a Direct Rollover to a Roth IRA
- You are requesting a Rollover/Distribution combination and would like your distribution directly deposited to your bank account
- Your account is invested in a Self-Directed account (e.g. Personal Choice Retirement Account)

Ready to get started?

This document serves as a quick checklist and reference guide to securely complete your transaction as timely and accurately as possible.

Go online to Transamerica.com and select the **Details** button next to your account. Select **Manage** from the left menu and select **Withdrawals** to get started. Be sure to have all the information below:

1. **If you have recently separated from employment,** your date of separation must be on file with Transamerica. This is typically available one to two pay cycles after your last day of employment.
2. **Information about your new eligible plan's record-keeper or IRA new provider,** in order for us to send a check:
   - Provider Name
   - Street Address, City, State, Zip Code
   - Account Number
3. **If your plan has stock,** the Deposit Transfer Corporation Number, so stock can be transferred without issuing certificates. This can be obtained from your new provider.

A Transamerica representative is also available to answer any questions and complete your rollover conveniently over the phone using the above information. Please call us at 800-755-5801 to get started.