



# NAME YOUR RETIREMENT BENEFICIARIES

## A STEP-BY-STEP GUIDE

**A few minutes now can save a lot of headaches down the road.**

As much as we'd all like to live forever (in good health, of course), it's important to plan for the future. Adding at least one beneficiary to your retirement account won't take long, but it may help provide for your loved ones even after you're gone.

Log in to your Transamerica retirement account and take a minute to choose, review, or update your beneficiaries.

### WHAT YOU'LL NEED

- Your username and password
- One or more beneficiary name

### HELPFUL (BUT NOT NECESSARY)

Additional beneficiary details, such as Social Security number and address.

### LET'S GET STARTED

Go to [transamerica.com/portal/hshs](https://transamerica.com/portal/hshs)

1. Click **LOG IN** at the top of the page. Enter your username and password and Log In.
2. Click **DETAILS** next to your retirement plan.
3. Click **Beneficiaries** under the Home menu on the left.
4. Enter information for one or more individuals, trusts, or estates as beneficiaries.



### You can add more details later.

To name an individual beneficiary now, you will only need to indicate their name and relationship to you. You can add more details, such as address, and Social Security number, later. Remember, this information could be important down the road — the more details we have, the better.



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## BENEFICIARIES — ADD/UPDATE PAGE

5. Press **Apply** and continue to add more beneficiaries, if desired. You can also name contingent beneficiaries from this page.

Once you are done adding names, click **CONTINUE**

## BENEFICIARIES — SUMMARY PAGE

6. Use the Beneficiaries — Summary page to confirm what you entered is correct. If not, use the Back button to fix it. Good? Click **SUBMIT**

## YOU'RE ALMOST THERE: IMPORTANT LAST STEPS

7. Click the **Accept** and **Continue** button on the Agreement screen. If you skip this step, your beneficiary information will not save.

**Agreement**

By clicking "Accept and Continue," you acknowledge this information is maintained by Transamerica solely as a courtesy to the plan sponsor. Transamerica is not responsible for verifying the accuracy or completeness of beneficiary designation information, nor is Transamerica responsible for determining whether such designation is in compliance with the terms of the plan. It is solely your responsibility as the participant to ensure that your beneficiary designation is correct. Please review the information provided here to determine whether it is accurate and check with your plan sponsor to ensure that your beneficiary designation is made in accordance with the terms of the plan.

By clicking "Accept and Continue," you state: I hereby designate the above individual(s) as my designated beneficiary(ies) under the plan. In the event I die before my entire vested account balance is distributed, such designated beneficiary(ies) shall receive the remaining vested balance of my plan account, if any. By making this designation, I hereby revoke any prior beneficiary designation(s) that I have made under the plan. I understand that if I outlive my primary beneficiary(ies) and, if applicable, my contingent beneficiary(ies), my benefit will be paid in accordance with the terms of the plan.

**ACCEPT AND CONTINUE**

## BENEFICIARIES — CONFIRMATION

8. When you see the Beneficiaries — Confirmation screen, your beneficiaries have saved in our system.

### Beneficiaries - Confirmation



Your beneficiary updates have been submitted.

## YOU CAN CHANGE YOUR BENEFICIARIES ANYTIME

Life's circumstances are always changing — more often than we expect. When you or your loved ones experience life events such as marriage, divorce, the birth of a child, or death in the family, review your beneficiary designation to make sure it's up-to-date.

We suggest picking a date to review your beneficiaries each year. Some people choose their birthdays, New Year's Day, or their favorite holiday. Following this practice will help you remember to review and adapt your designations with the changes that each year brings.



**Visit:** [transamerica.com/portal/hshs](https://transamerica.com/portal/hshs)



**Call:** 800-755-5801

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