



# HOW CAN WE HELP?

Setting up and understanding your isolated 401(k) plan benefit can be tricky. That's why we're here. Your plan is managed by a support team of experts ready to answer all your questions. Just reach out and give us a call.

We're happy to help.



## Customer Support

### Have a problem accessing or setting up your account?

#### Website Support:

- Registration and lock-out support
- Password and Login questions/reset

#### Transaction Support:

- Loan requests/status
- Withdrawal requests/status
- Withdrawal of auto-enrollment contributions within first 90 days

#### Service Support:

- Balance Inquiry
- Contribution/Beneficiary Changes
- Investment Changes
- Statements



### TransDirect Participant Call Center

Weekday Hours: 8:00 AM – 8:00 PM EST  
(800) 401-8726

[www.transamerica.com](http://www.transamerica.com) (live chat)

### Have plan questions? Need an enrollment meeting?

#### RSG Advisory (RSG)

Your dedicated team:



**Judy Gutierrez** Judy@RSGadvisory.net

**Jessica Hodges** Jessicah@RSGadvisory.net

**Lisa Grzenia** Lisa@RSGadvisory.net

**Larissa Todd** Larissa@RSGadvisory.net

- Advisory Plan Sponsor Related Questions and Support
- Consulting support for Plan Design or Restructuring
- Enrollment Meetings
- Ongoing Education Seminars
- 401k Investment Allocation Advice - Investment lineup and/or underlying fund inquiries
- Financial Education: Pre-Tax vs. Roth, Investments, Withdrawal vs. Loan, Investments and more
- Planning Advice and Setting Retirement Goals

## Customer Support

### Questions on 401(k) related payroll issues?

- Enrollment assistance (i.e. unable to enroll through Transamerica website)
- Contribution issues
- Census and plan set up and changes
- Payroll and annual match or profit sharing calculations



**isolved**

**Andrea Wadington**  
Awadington@isolvedhcm.com

**Marie Belardinelli**  
MBelardinelli@isolvedhcm.com

### Need Plan compliance or documentation help?

**National Professional Planning Group, Inc. (NPPG)**

clientservices@pfslink-e.com



- Questions about the annual questionnaire
- Profit sharing allocations
- Dept. of Labor discrimination testing failures
- Amendments to your plan



**We're here to support your 401(k)**



**RSG Advisory**  
Investment Advisory



**NPPG**  
Plan Compliance

