



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 (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

- 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

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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)

