

## MANAGE YOUR INVESTMENTS DAY AND NIGHT FROM YOUR HOME OR OFFICE

### PHONE

By calling 1-800-401-TRAN, the 24-hour TransDirect number, you can:

- Change your PIN
- Get your current account balance
- Check/change your current investment mix
- Order statements on demand
- Speak to a Service Representative\*

\*An English/Spanish speaking Service Representative is available toll-free 9am to 7pm Monday through Friday, Eastern Time.

Press 1 to Change PIN

Press 2 for Account Balance Information

- Press 1 For Balances by Investment Fund
- Press 2 For Balances by Account Type
- Press 3 For Balances by Combination
- Press 4 For Statement by Request

Press 3 for Investment Direction Information

- Press 2 For Information About Investment of Future Contributions
- Press 3 For Information About Existing Investments
- Press 4 To Change Investment Direction of Future Contributions
- Press 5 To Transfer Investments to a Fund or Funds
- Press 6 To Redistribute all Existing Investments
- Press 7 To Set Up or Cancel a Periodic Rebalancing Transfer
- Press 8 To Set Up or Cancel a Periodic Dollar Cost Averaging Transfer

Press 4 for Loan Information

- Press 1 For General Information
- Press 2 For Outstanding Loan(s)
- Press 3 To Model a Loan

Press 5 for Withdrawal Information

- Press 1 For Available Amounts

Press 6 for Investment Performance

- Press 9 to Replay Current Menu
- Press \* to Return to Main Menu
- Press 0 to Speak to a Service Representative

### WEB SITE

By logging on to the Web site at: [www.TA-Retirement.com](http://www.TA-Retirement.com), you can access the following information:

- Review your Personal Information
- View your Account Balance Information
- Check Fund Performance Information
- Review Investment Percentages

From the "Transaction Menu" you can choose from the following:

- Change PIN
- Change Investment Elections
- Request Statement
- Periodic Rebalancing Transfer
- Dollar Cost Averaging Transfer
- Final Result Transfer
- Specific Fund Transfer

### GENERAL NOTES

- Changes to the investment of future contributions are effective immediately.
- Transfer requests received prior to 4:00pm Eastern Time will be processed at the close of business that day. Otherwise they will be processed the next business day.
- Redirecting your future allocations will NOT automatically change your current account balance.
- Transfers must be requested in whole percentages.
- All allocation changes and transfers processed on TransDirect are confirmed by mail.
- Dollar Cost averaging involves continuous investment in securities regardless of fluctuating price levels. Investors should consider their financial ability to continue purchases through periods of low price levels.