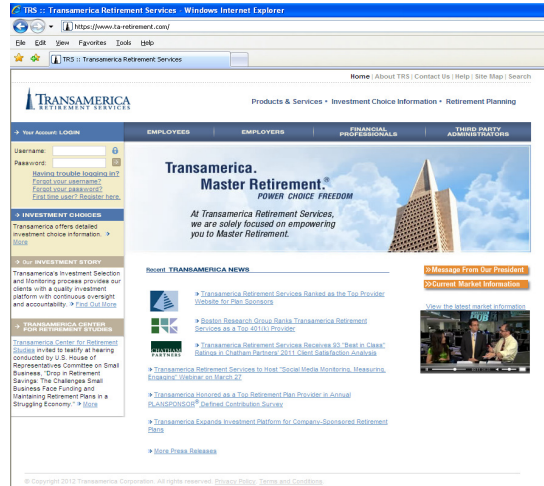


# Online and Telephone Enrollment Instructions

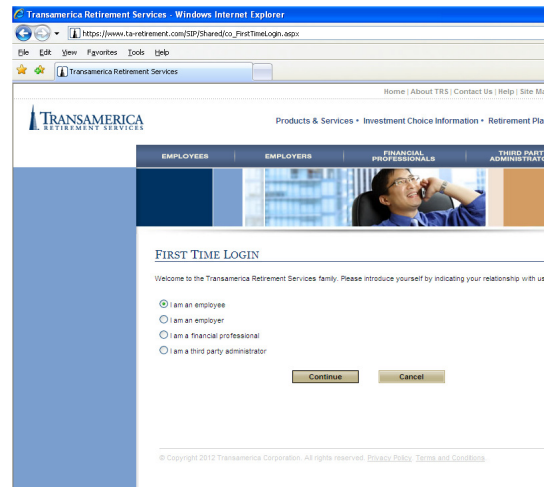
To Enroll Online Log into: [www.TA-Retirement.com](http://www.TA-Retirement.com)

***In order to enroll online you will need to provide us with your current e-mail address. If you do not have an e-mail address you can enroll via the telephone. Please refer to the telephone instructions.***

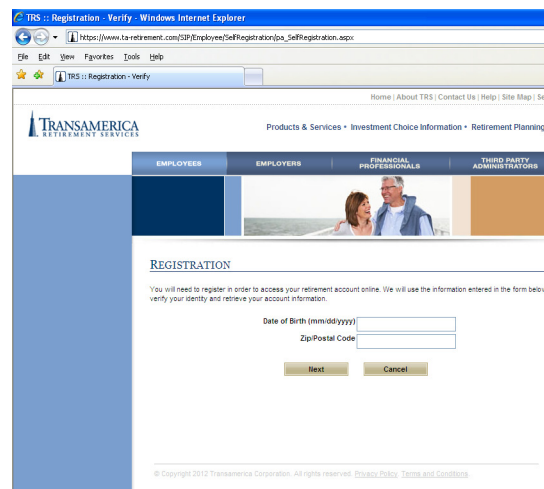
- Click on the **First time user? Register here** link located on the top left-hand corner of your screen within the. Your Account: LOGIN section.



- Select **I am an employee** and click **Continue**.



- Enter your Social Security Number and click **Continue**.



- Enter your Date of Birth and ZIP/Postal Code and click **Next**.

- Create your own unique Username and Password and click **Next**.
- Agree to the site Terms of Use.
- Agree to the Consent to Do Business Electronically agreement.
- On the Welcome to Plan Enrollment screen, please click on **Start**.
- From this point forward follow the simple online instructions which will help you setup or make changes to your contribution rate, investment choices, and future contribution elections.

**If you cannot enroll online please see below for Telephone Enrollment Instructions.**

**To Enroll by Phone: 1 (800) 401-TRAN (8726)**

To utilize the phone enrollment process you will need to use a touchtone phone.

**Press 1** for English

**Press 2** for Spanish

**You will then be prompted to enter your 9 digit Social Security number followed by the pound sign (#) and your 4 digit PIN (Personal Identification Number). Your default PIN is your month and day of birth in MMDD format\*, followed by the pound sign (#).**

### **1. PERSONALIZE YOUR PIN**

As a first time user, you will be prompted to change your PIN on initial use. The system will request you to enter your new 4 digit PIN, followed by the pound sign (#). Re-enter your 4 digit PIN, followed by the pound sign (#) to confirm. A message will indicate that your PIN was changed successfully. A confirmation will be mailed to your address.

### **2. ONLINE ENROLLMENT DISCLOSURE**

You will be asked to complete the online enrollment process. The disclosure message will ask you if you agree to the terms and conditions of utilizing the online enrollment process. Listen carefully to the terms and conditions, **Press 1** to agree to the terms and conditions of online enrollment.

### **3. SET UP DEFERRAL/CONTRIBUTION RATE**

Your contribution rate is the amount that will be withheld from each paycheck. Enter the rate to be withheld from each paycheck followed by the pound sign (#). **Press 1** to confirm the rate. The contribution rate you select will be sent to your employer to be deducted from your paycheck based on payroll cutoff dates.

### **4. SET UP INVESTMENT ELECTIONS (See Investment Choices Worksheet)**

Your contributions will be invested according to the selections you make here. You will be prompted to enter the percentage to be allocated to each investment option in your plan until the total allocated equals 100%. Percentages must be in whole percentage increments. **Press 1** to confirm your elections. A confirmation will be mailed to your address.

**Once the phone enrollment process is completed, you may now hang up to end the call or hold and you will be connected to the main menu.**