

PLAN SPONSOR RETIREMENT WEBSITE OVERVIEW

The following information is available under your Plan Sponsor account online at www.TheContractorsPlan.com. Select **Retirement Plan** on the left hand navigation to be directed to the Transamerica retirement portal. There you will find everything you need to manage your retirement plan account. **Once on the Transamerica retirement portal, you will have access to the following information:**

Plan Information

Account Summary

- Participant balances
- Forfeiture balance
- Total account balance
- Outstanding loan balance

Plan Details

- Plan provisions
- Investment choices summary

Plan Information Document Center

- View reporting & testing, notices & communications, statements and confirmations and audit packages

Plan Investments

Portfolio Value

- Investment choices along with ending balances

Investment Performance

- Performance of plan investment choices

Plan Administration

Add Participant

- Add newly enrolled participants to your plan by submitting participant data

Disbursement Status

- View the status of participant disbursements for loans and distributions

Forms

- Download the forms you need for both participants and plan administration

Plan Reports and Participant Information

- Access reports such as contribution reports, participant reports, distribution reports, loan reports and plan level reports
- Look up an employee's account by name or Social Security Number

The screenshot shows the 'PLAN INFORMATION' section of the website. It includes a navigation bar with links: Home, Installation, Participant Information, Plan Information, Plan Administration, Plan Reports, and Resources. The main content area has a header 'PLAN INFORMATION' and 'PLAN DETAILS'. Below this, there are two columns: 'Account Summary' and 'Client Support'. The 'Account Summary' column shows 'As of September 14, 2023' and a table with 'Participant Balance', 'Forfeiture Balance', and 'Total Account Balance', all listed as \$0.00. The 'Client Support' column lists the 'Client Relationship Manager' as Alicia Bedross, with her address, phone, and email.

The screenshot shows the 'PLAN INVESTMENTS' section. It includes a navigation bar with links: Home, Installation, Participant Information, Plan Information, Plan Administration, Plan Reports, and Resources. The main content area has a header 'PLAN INVESTMENTS'. Below this, there is a section 'Portfolio Value' with a table showing investment options, asset class, shares, units, share value, and ending balance as of January 24, 2024. The table lists three investment options: Transamerica Stable Value Reserve Option, GFA Inflation-Protected Securities 1, and FGM Total Return Bond 2.

The screenshot shows the 'PLAN ADMINISTRATION' section. It includes a navigation bar with links: Home, Installation, Participant Information, Plan Information, Plan Administration, Plan Reports, and Resources. The main content area has a header 'PLAN ADMINISTRATION' and 'PENDING DISTRIBUTIONS - SUMMARY'. Below this, there is a section 'You have 7 distribution(s) pending approval. To view a distribution request, select a name from the list below.' and a table with columns: DATE, NAME, DISTRIBUTION TYPE, AMOUNT, and CONTRACT ID. The table lists three pending distributions for Wendy J. Wright, Roddy Stevens, and Jasb Baupista.

The screenshot shows the 'PLAN REPORTS' section. It includes a navigation bar with links: Home, Installation, Participant Information, Plan Information, Plan Administration, Plan Reports, and Resources. The main content area has a header 'PLAN REPORTS' and 'CONTRIBUTION REPORTS'. Below this, there are three sections: 'Contribution Detail', 'Changes to Contribution Rate', and 'Contribution Rate'. Each section provides a brief description of the report and a link to view the report.



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