

SUBJECT: Notification of Transamerica Open Banking API Now Available

Preview Text: ByAllAccounts Migration to Transamerica Open Banking API

What: The Transamerica API is now available for ByAllAccounts aggregation

When: The new open banking API is available now. Users should follow re-authorization and consent prompts to get accounts aggregating.

Why You Need to Act:

The Transamerica Open Banking API is now available through ByAllAccounts. The new API is listed as “Transamerica”. Transamerica has historically not allowed screen-scraping. Migration has been completed. Users should add their new Transamerica accounts or edit existing accounts and follow the re-authentication and consent prompts to aggregate.

ByAllAccounts is transitioning to open banking APIs to provide more reliable aggregation, minimal disruption, and enhanced security. Users will now directly enter their credentials with their financial institution, ensuring a secure aggregation process.

Transamerica Financial Institutions (FI) Moving to Open Banking API:

Old FI IDs	Old FI Names	New FI ID	New FI Name
112241	Transamerica - AMC Theaters (Investment)	113658	Transamerica (Investment)
111133	Transamerica - Danone (Investment)		
110639	Transamerica - Development Alternatives, Inc. (DAI) (Investment)		
110867	Transamerica - Mission Health (Investment)		
112085	Transamerica - Penske Pension Plans (Investment)		

110086	TransAmerica - Retirement Plans (Investment)		
97477	Transamerica - The Coca-Cola Company (Investment)		
50655	Transamerica Insurance & Investment - MyTransamerica (Investment)		
44333	Transamerica Life Insurance Annuities - Individual Investors (Investment)		
41832	Transamerica Retirement Solutions - My TRSRetire (Investment)		

Important Actions to Take:

If Your Organization Has Signed the Financial Institution Data Access (FIDA) Addendum:

Users will need to reauthenticate their credentials and consent to aggregation. You may also add new accounts for aggregation. To assist you, we have provided step-by-step guides for advisors and consumers/clients/investors.

[For Advisors \(leveraging ByAllAccounts AccountView\)](#)

[For Consumers/Clients/Investors \(leveraging ByAllAccounts Connect User Interface\)](#)

If Your Organization Has NOT Signed the Financial Institution Data Access (FIDA) Addendum:

Please reach out to [Needa Memon](#) to sign the Financial Institution Data Access (FIDA) Addendum. Failure to do so will result in lack of access to "Transamerica".

Please contact the ByAllAccounts Technical Support Team at allaccounts-support@morningstar.com with any questions regarding this upcoming migration.

The ByAllAccounts Team