

OPTIMIZING YOUR CLIENT'S RETIREMENT PLAN

THE BENEFITS OF WORKING WITH A
TRUSTED RETIREMENT PLAN PROVIDER



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TRANSAMERICA[®]

Insurance / Investments / Retirement

RESHAPING THE FUTURE OF RETIREMENT PLANNING

Your clients trust you to work closely with a retirement plan provider that best meets their unique needs. That's why we put plan sponsors and their participants at the heart of everything we do. Plan participants receive the tools and resources to help them make educated decisions about retirement — including how to prepare for future healthcare costs — while employers enjoy competitive pricing and customized plan design to help meet their goals and objectives. In short, your clients can benefit from the knowledge, experience, and professionalism of a leading retirement plan provider.



EXPERIENCE YOU CAN COUNT ON

Working with Transamerica means giving your clients a retirement plan provider with a proven track record of success.



28,700
total retirement plans

80 years
of retirement experience

\$226B
in retirement plan assets

As of December 31, 2018

PUTTING YOUR CLIENTS FIRST

Transparency, knowledge, and industry experience come standard with every Transamerica team. Our dedication to plan sponsors and their participants sets us apart. From eligibility and enrollment to ongoing education and retirement guidance, we're there every step of the way.



ELIGIBILITY



ENROLLMENT
(Automatic or voluntary)



OPTIMIZATION



ONGOING
EDUCATION



RETIREMENT TRANSITION/
JOB CHANGES

MAXIMIZING RETIREMENT WITH WEALTH + HEALTHSM

What good is wealth if people don't have the health to enjoy it? Transamerica's innovative Wealth + Health approach goes beyond traditional planning by focusing on financial preparation and physical well-being. The result is a holistic solution that helps participants get the most out of their retirement. Wealth + Health resources include:



Digital education
materials



Quarterly
newsletters



Personalized
participant emails

59%

Nearly 3 in 5 employees agreed they would have greater commitment to their company if they offered programs to improve their health and well-being.

"Stressed Out: Americans Settle in During Healthcare Uncertainty," nonprofit Transamerica Center for Health Studies®, 2019

SOLUTIONS DIVERSE AS YOUR NEEDS

Your clients' needs are varied. Our solutions are designed to meet their unique challenges head on. From investment choices and technology to plan design and administrative support, Transamerica offers the flexibility to customize offerings specifically for your clients and their employees.





TRANSAMERICA®

**Let's talk about how we can meet your
clients' retirement needs.**

Learn more at [transamerica.com](https://www.transamerica.com)