



CREATING A SECURE FINANCIAL FUTURE

Professional advice, personalized for you

MANAGED ADVICE[®]

Participating in your workplace retirement plan is a terrific first step in securing your financial future. But when it comes to building a comprehensive retirement strategy, many people recognize the value of professional help.

Your retirement plan offers *Managed Advice*, an easy-to-use, professionally managed service that can save you time and effort in building a sound retirement strategy. And we're here to help you along the way.

CUSTOMIZED RETIREMENT STRATEGY JUST FOR YOU

Managed Advice brings the pieces together to help you create a strong foundation for a successful retirement:



SIGNING UP TAKES A MATTER OF MINUTES

- The service is available through your existing retirement plan
- Access your account from any device and make adjustments to your strategy with a few clicks

65%

of workers would like more information and advice from their employers on how to reach their retirement goals.¹

REASONABLE FEES

The fee is less than what you'd typically pay an independent financial advisor.² The fee is 0.25%% annually, which comes to about \$0.21 cents per month (\$2.50 annually) for every \$1,000 in your account. First-time subscribers may be eligible to try the service for free. For further information, please log in to your account.

Simplify your financial life. Get a personalized portfolio custom built for you, and view all pieces of your retirement strategy in one place with *Managed Advice*.



Connect with us:



LOG IN to your account to explore *Managed Advice* and sign up



SCHEDULE appointment



Call 844-622-2133

¹ "21st Annual Transamerica Retirement Survey of Workers," nonprofit Transamerica Center for Retirement Studies, 2021

² "Average Financial Advisor Fees," AdvisoryHQ, 2021

Important: The projections or other information generated by the engine regarding the likelihood of various investment outcomes are hypothetical, do not reflect actual investment results, and are not guarantees of future results. Results derived from the tool may vary with each use and over time. Please visit your plan website for more information regarding the criteria and methodology used, the engine's limitations and key assumptions, and other important information.

Transamerica's Advice Services includes *Managed Advice*® and *Advisor Managed Advice*™. The *Managed Advice*® service is available within an employer-sponsored plan or an IRA and is offered through Transamerica Retirement Advisors, LLC ("TRA"), an SEC-registered investment advisor. In a retirement plan, the investment options used in *Managed Advice*® are selected by your plan sponsor/plan fiduciary. In an IRA, the investment options used in *Managed Advice*® have been selected by an independent, third-party registered investment advisor, who acts as a fiduciary for lineup selection. The *Advisor Managed Advice*™ service is offered through your retirement plan's third-party registered investment advisor and TRA, and investment options are selected by your plan sponsor/plan fiduciary. TRA does not select or endorse any of the investment options available in a plan or in an IRA. Investment options may include Transamerica proprietary investment funds or stable value products offered by Transamerica affiliates. Transamerica Retirement Solutions and TRA are affiliated companies. Morningstar Investment Management, LLC®, a wholly owned subsidiary of Morningstar Inc., is an SEC-registered investment advisor that serves as an independent financial expert and provides the underlying investment advice and portfolio management methodology for Advice Services. Neither Morningstar nor your plan's third-party registered investment adviser (as applicable) is affiliated with any Transamerica companies. Please see the Advice Services agreement as applicable for more information on the terms and conditions that apply as well as the information provided to you in Form ADV Part 2A. Investment return and principal value will fluctuate with market conditions and you may lose money.

All investments involve risk, including loss of principal, and there is no guarantee of profits. Investors should carefully consider their objectives, risk tolerance, and time horizon before investing. There is no assurance that any strategy will meet its stated objective.

This material was prepared for general distribution. It is being provided for informational purposes only and should not be viewed as an investment recommendation. If you need advice regarding your particular investment needs, contact your financial professional.

Securities offered through Transamerica Investors Securities Corporation (TISC), member FINRA, 440 Mamaroneck Avenue, Harrison, NY 10528. All Transamerica companies identified are affiliated but are not affiliated with your employer.