



PLAN DESIGN TAFT-HARTLEY PLANS

For more than 85 years, we've worked behind the scenes helping our union clients build the plans that build retirement security. We are committed to the local, regional, national, and international unions we serve, just as they are committed to their trades and their members. Transamerica supports the hard work and dedication of those who build, teach, and care for America as they provide competitive retirement benefits for their members.

BUILDING TOWARD A BRIGHTER RETIREMENT

Transamerica's commitment to trade unions and their hardworking members is broad and deep. We offer a wide range of retirement plan services for all qualified Annuity Funds and Pension Plan types, for market segments over \$10 million in plan assets. We work with all employer- and fund-sponsored plan types, bringing our dedicated people, skills, and resources to work alongside yours.

HOW WE WORK WITH TRUSTEES

A Taft-Hartley plan represents a significant and strategic commitment from your organization, and managing it effectively may take a team. Transamerica can work with the Fund Office and your service providers — like financial advisors and third party administrators — to handle the intricacies involved. Your Transamerica representative attends trustee meetings to better understand organizational needs and goals and is your single point of contact, overseeing and resolving issues such as:

Day-to-day
task management



Compliance



Combined
payroll feed



Audit support



MEMBER SUPPORT SERVICES

Ultimately, your Taft-Hartley plan helps members build a brighter retirement. When you work with Transamerica, your members enjoy our full suite of tools and resources that guide them in assessing, understanding, and working to improve their chances for an on-time, fully funded retirement.

Members benefit from:



A holistic view of their financial lives. They can see all of their plans and benefits through consolidated statements that can include defined benefit and defined contribution plans. Statements can be broken down by contributions per contractor, allowing members to self-audit.



Interactive forecasting tools. The *OnTrack*® tool produces a personalized retirement income forecast called *Your Retirement Outlook*®. Using easy-to-understand weather icons, the forecast shows the likelihood of achieving the desired retirement income goal using current savings and investment strategies.



Holistic retirement planning. We help people better understand the connection between financial wellness and personal well-being as they prepare for the future. Members may access a large variety of informative, engaging materials on their schedule. The materials are plan-specific, personalized results-driven communications designed to drive action.



SOPHISTICATED SERVICES, TAILORED FOR YOUR NEEDS

All plans and organizations have unique needs, and we customize our services to fit yours. We can help alleviate administrative duties to the extent you prefer, and our dedicated team is ready to address the issues you face. Here are some of the benefits when you choose Transamerica as your Taft-Hartley provider:

- **Dedicated, U.S.-based call center and a Taft-Hartley specific phone number.** This allows the call to be immediately routed to a Taft-Hartley representative who is prepared to address the member's questions.
- **State-of-the-art, proprietary recordkeeping platform.** Our advanced technology allows tracking employer transactions and union account activity by Sub-ID, allowing easier administration and a personalized member experience. The platform is flexible, accommodating each unique plan design.
- **Open-architecture investment platform,** allowing the flexibility to build an investment lineup that meets your fiduciary duty.
- **Fee and revenue transparency,** including net expense ratios, plan administration costs, and disclosure of any revenue we receive from investment providers.
- **Vigilant cybersecurity measures.** Online security is critically important to you — and to us. We proactively protect plan and participant information against cyber criminals, and encourage members to take actions that contribute to their own security.
- **A written guarantee for our services,** so you can be confident when you work with Transamerica.

We have extensive experience serving the following industries:

Aerospace | Auto workers | **Brewers distribution companies** | Bricklayers and stone masons | **Bridge engineers** | Commercial food | **Construction** | Education | **Electrical** | Energy | **Fabrics/Textiles** | General manufacturing | **Grocers** | Health management | **Industrial craftsman** | Ironworkers | **Laundry** | Lighting | **Machine—tool and die** | Metal and glass | **Mills** | Office and professional employees | **Painters** | Paper converting | **Pipefitters** | Plastering | **Plastics** | Plumbers | **Police and fire** | Pork processors | **Rehabilitation** Roofers | **Sheet metal workers** | Steamfitters | **Steel workers** | Operating engineers

Let's work together

Our long experience working with union clients has given us a clear understanding of the unique needs of Plan Trustees, Fund Offices, and members — and a variety of strategies to help address those needs. Working with TPAs, custodians, and Fund Office staff, we help create optimal servicing solutions for your members.

Contact us to learn more.



CALL
800-755-5801



VISIT
Transamerica.com

Important: The projections or other information generated by the engine (which produces *Your Retirement Outlook*[®]) 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.

Securities offered through Transamerica Investors Securities Corporation (TISC), member FINRA, 440 Mamaroneck Avenue, Harrison, NY 10528.

All Transamerica companies identified are affiliated.