



Plan design

# Taft-Hartley Plans



live your best life

# Committed to unions. Focused on retirement solutions.

Local, regional, national, and international unions support the hard work and dedication of those who build, teach, and care for everyday Americans. They are committed to their trades and their members – and Transamerica is committed to them. For 90 years, we have worked behind the scenes helping our union clients with competitive retirement plans that help members live their best lives.

## 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:



**Clear, consolidated insights** – View all plans and benefits in one statement, including defined benefit and contribution plans, with breakdowns by contractor for easy self-auditing.



**Personalized retirement forecasting** – Our *OnTrack*® tool delivers *Your Retirement Outlook*® using simple weather icons to show progress toward income goals.



**Holistic planning resources** – Access engaging, plan-specific materials anytime to connect financial wellness with overall well-being and inspire 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 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 stonemasons |  
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



Visit [transamerica.com](https://transamerica.com)



Call: **800-755-5801**

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**Important: The projections or other information generated by the engine (which produces *Your Retirement Outlook*<sup>®</sup>) 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.**

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