



live your best life

Transamerica Advantage Solution[®]



Transamerica Advantage Solution® (TAS) is how we show our TPA partners how much we value them. In fact, we require a TPA for plans with less than \$5 million.

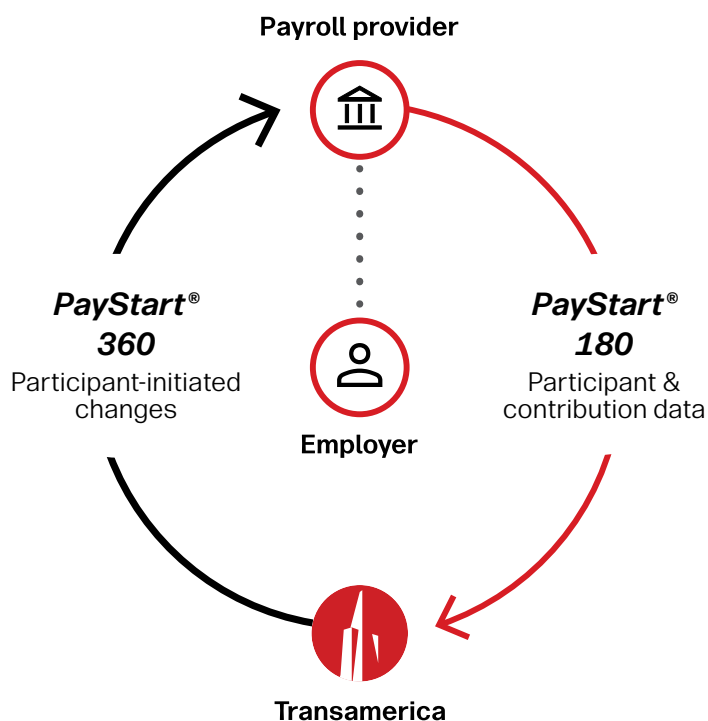
- Designed for startups or established plans with significant assets
- Created based upon direct feedback from our third party administrator (TPA) partners
- It's worth repeating that Transamerica requires a TPA for plans with less than \$5 million in assets

The goal? To help our TPA partners gain a competitive advantage for startup and established plans seeking to help create brighter retirement outcomes.

85%

of new Transamerica business is with our TPA partners!

Transamerica total bundled vs. unbundled sales as of December 31, 2024



Cost transparency, flexibility, and competitive pricing by design

- Qualified default investment alternative (QDIA) options designed to drive brighter retirement outcomes for plan participants
- Includes investments designed for stability
- Co-manufactured target date funds with American Funds, BlackRock®, and American Century
- 3(21) and 3(38) fiduciary support available

Efficient, proven recordkeeper

We leverage some of the most advanced technology in the industry to ensure you – and the participants in the plans you serve – enjoy accurate and efficient service as quickly as possible.

Better still, our proven, proprietary recordkeeping system offers a breadth of features, flexibility, and customization capabilities to make your job easier.

Seamless payroll integration

We offer simple, effective ways to accelerate payroll contributions. In fact, your client's payroll company can send files directly to us through our *PayStart®* services.

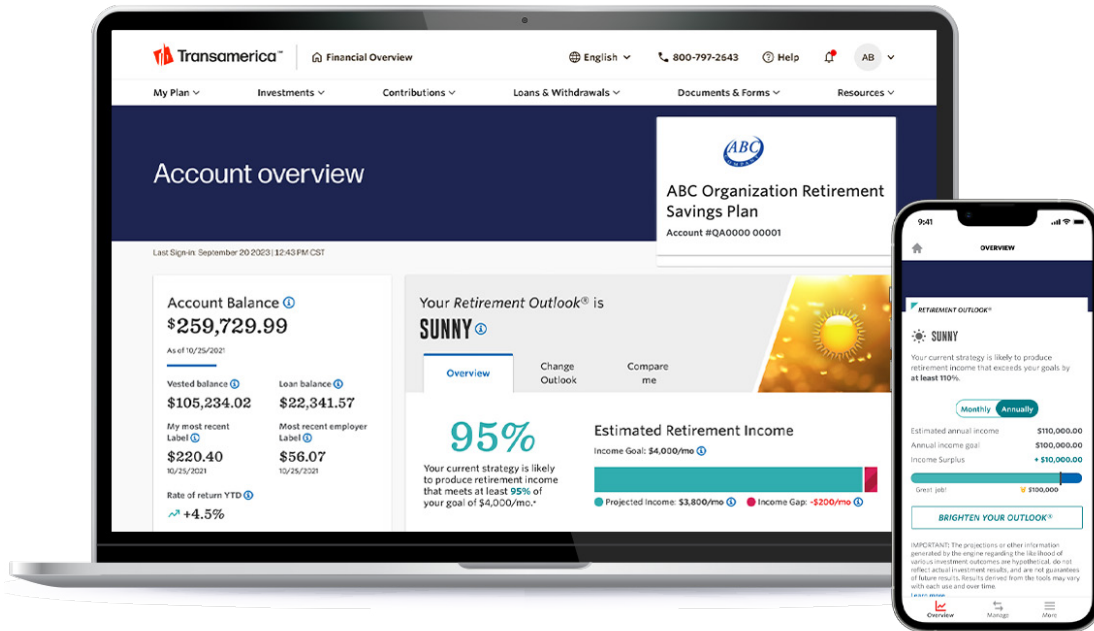


Image is example only and does not reflect the experience of any particular user.

Transformational technology

Regardless of plan size, our unique online experience is driven by the *OnTrack*® tool, which produces an easy-to-understand retirement readiness forecast called *Your Retirement Outlook*®. Based on the assessment, participants can make changes to improve their chances of reaching their retirement-income goals. And they can engage anywhere, anytime using our fully integrated mobile app.

Participant experience

Through Transamerica, employees have access to a comprehensive array of resources, including:

- Dedicated customer care team
- Retirement planning consultants to help employees navigate key financial decisions, available virtually or onsite for some plans
- A mobile-friendly website, which puts all the information participants need at their fingertips
- Educational meetings covering valuable financial topics through in-person seminars, live sessions, or recorded webinars
- Spanish capabilities for participant website and communications (certain investment-related information is not eligible for translation due to regulatory restrictions)

**Participant
Net Promoter
Score (NPS)**

73

Monthly participant NPS data
as of December 31, 2024

Your TPA Solutions Team

You'll have access to:

- Regional vice presidents and regional retirement consultants from coast-to-coast to assist you in selling plans with advisors and plan sponsors
- TPA business development managers will partner to positively impact your sales growth by assisting you with strategic planning, training, and being your advocate both inside Transamerica and in the industry

For more information, contact us:



tpaservices@transamerica.com



Scan the QR code to review the TPA toolkit



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.

The co-managed target date investment options (Funds) are offered through the Transamerica Retirement Solutions Collective Trust, which is sponsored and trusteeed by Transamerica Trust Company (TTC). TTC is an Iowa-domiciled trust company and maintains fiduciary authority over the management of, and investments made in the Funds. The Funds are exempt from registration under the Securities Act of 1933, as amended, and the Investment Company Act of 1940, as amended. As such, there is no prospectus available for these funds. The Funds are offered through a Disclosure Memorandum, which includes a description of the Funds' principal investment objectives, strategies, fees, expenses and risk. Prospective investors should carefully review the Disclosure Memorandum before making an investment in the Funds. Investments in the Funds are not insured by the FDIC, the Federal Reserve Bank, or any other governmental agency, nor are they guaranteed by TTC or any affiliate. The Funds are only available to certain qualified retirement plans and certain state or local government plans.

Securities offered through Transamerica Securities Investors, LLC, member FINRA, 440 Mamaroneck Avenue, Harrison, NY 10528.
Investment advisory services are offered through Transamerica Retirement Advisors, LLC (TRA), registered investment advisor.

All Transamerica companies identified are affiliated.