



# DISRUPTING THE RETIREMENT LANDSCAPE

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**Multiple Employer Plan (MEP), Pooled Employer Plan (PEP),  
*Group Plan Solution*<sup>SM</sup> (GPS), and *Retirement Plan Exchange*<sup>®</sup>**

## **TRANSFORMATION STARTS WITH TRANSAMERICA**

**Pooled plans have been gaining traction as the “next big thing” in retirement. But pooled plans are no newcomer to the scene. In fact, Transamerica introduced a creative solution two decades ago.**

Originally, workplace retirement programs were limited to individual employer-sponsored plans, like the 401(k). Their pricing and investment options catered to larger organizations and were often too inflexible, costly, and risk-prohibitive for smaller businesses. Many businesses were shut out — and many American workers were denied the opportunity to save for retirement.

## **TRANSFORMING LIVES BY TRANSFORMING ACCESS**

The Transamerica commitment to the qualified retirement plan market runs deep. We are working hard to help people live their best lives and believe everyone should have access to a workplace retirement plan. So when an inclusive retirement option didn't exist, we created a unique solution exclusive to Transamerica.

But we didn't stop there. To ensure employers and employees could both reap the benefits, we developed a practice that includes a proven, time-tested recordkeeping system specifically for pooled plans. Our support structure provides access to dedicated teams across various disciplines, including installation, compliance, administration, client management, sales, and marketing.



**20+ YEARS**

POOLED SOLUTIONS EXPERIENCE



**DEDICATED**

TEAM OF SPECIALISTS



**PROVEN  
RECORDKEEPING PLATFORM**

SPECIFICALLY FOR POOLED PLANS



**DRIVING**  
LEGISLATIVE CHANGE

## DRIVING CHANGE FROM INSIDE THE BELTWAY

Introducing a revolutionary new plan model was just the beginning. We needed systemic change to reach the widespread adoption and access that could truly change lives and financial futures. So, Transamerica went to Washington.

Driven by our shared purpose and passion to make workplace retirement plans more accessible, senior leaders within Transamerica worked with the Department of Labor (DOL) and members of Congress to shape policy and craft provisions to expand access to retirement plans for American workers. Our advocacy and active dialogue with regulators and lawmakers drove legislative change, improved regulatory outcomes, and allowed us to represent the voices of small businesses and American workers with regard to retirement planning.

## THE INDUSTRY LEADER YOU CAN TRUST

When you combine our unwavering commitment and passion with our deep experience and resources, it's clear why Transamerica is the premier recordkeeping partner for pooled plans and beyond.

# L

### Leading EXPERTS

Advocate for pooled solutions at national level for more than **20 years**

# E

### Experienced PARTNERS

Pooled plan arrangement experience: **408** plan sponsors; **13,513** adopting employers; **\$20.1B** in pooled plan assets<sup>1</sup>

# A

### Affordable SOLUTIONS

Flexible options of all plan types: **MEPs, PEPs, and Group of Plans**

# D

### Dedicated SUPPORT

Consultative services to help clients and partners find strategies to achieve goals and ongoing plan growth and support

# E

### Enhanced OUTCOMES

Proven record of improving participants' retirement readiness

# R

### Recordkeeping SPECIALISTS

Proven recordkeeping platform developed specifically for pooled plans to track both individual plans and aggregate level

## Get in touch.

Contact us for consultation on the best pooled plan arrangement for your client:



**Call:** 866-393-8967



**Email:** [pooledplansales@transamerica.com](mailto:pooledplansales@transamerica.com)



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

<sup>1</sup> As of Dec. 31, 2023

Before adopting any plan, you should carefully consider all of the benefits, risks, and costs associated with a plan. Information regarding retirement plans is general and is not intended as legal or tax advice. Retirement plans are complex, and the federal and state laws or regulations on which they are based vary for each type of plan and are subject to change. In addition, some products, investment vehicles, and services may not be available or appropriate in all workplace retirement plans. Plan sponsors and plan administrators may wish to seek the advice of legal counsel or a tax professional to address their specific situations.

