



Creating a brighter financial future

Managed Advice[®] IRA

Professional advice, personalized for you

When it comes to building a comprehensive retirement strategy, many people recognize the value of professional help. The Transamerica *Managed Advice* IRA takes the guesswork out of retirement planning and helps save you time by handling the day-to-day investment decisions.

Customized retirement strategy just for you

The *Managed Advice* IRA brings the pieces together to help you create a strong foundation for a successful retirement.

41% of retirees agree they should have relied more on outside experts to monitor and manage their retirement savings.¹



Steer toward the future you've worked for

Along with a tailored investment strategy to your unique situation and goals, you'll have access to a team of financial professionals who can answer your questions and offer support every step of the way. Be sure to keep your profile updated, so the service can determine the most appropriate investment mix as things change.

Reasonable fees

The *Managed Advice*® IRA costs less than what you'd typically pay an independent financial advisor.² The fee is no more than 0.45% annually, or about 38 cents for every \$1,000 in your account each month.

Open an account

There is no minimum balance requirement, and you can open a *Managed Advice* IRA online in minutes.

Log in to your account:

- From the **Account Overview** page, select **Rollovers** under the **My Plan** tab
- Select **FIND YOUR IRA** -> under **Open an Individual Retirement Account (IRA)**
- Follow the prompts to establish your account

Save time and avoid the day-to-day management of your retirement journey.
***Managed Advice* can help you live your best life – now and in retirement.**

Connect with us:



[Log in to your account](#)



Call 866-210-9128 weekdays, 8 a.m. to 8 p.m. ET

¹ "Retiree Life in the Post-Pandemic Economy," nonprofit Transamerica Center for Retirement Studies® (TCRS), November 2024. Transamerica Institute®, including TCRS, is a nonprofit, private operating foundation.

² "Average Financial Advisor Fees," Advisory HQ, 2023

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 do not guarantee future results. Results derived from the engine 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.

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