



# YOUR SATISFACTION IS OUR PASSION

## Customer Satisfaction Ratings

**Excellence is worth the effort, and we're proud to say our efforts are achieving results.**

Employers expect and deserve excellent service when working with a top-tier retirement plan recordkeeper. Transamerica has cultivated an environment where service excellence is the norm. Our **Listen. Learn. Act.** customer experience process permeates everything we do, from internal processes to training to advisor and plan sponsor communications.

We've made significant investments to build a foundation for the level of service excellence our clients and plan participants deserve, including infrastructure to support a continuous customer feedback loop. We actively seek feedback; we measure it, monitor it, and track it. By learning from what we hear, we can enhance the experience of our clients and plan participants.

But we don't just talk about our strong numbers. We go to the next level by sharing them directly with you. As of June 30, 2023, here's how we did:



### **PARTICIPANT SATISFACTION RATINGS<sup>1</sup>**

Transamerica's customer experience platform asks participants to rate the service they receive from our customer care representatives and retirement planning consultants (RPCs).

Participant call center representative: **94%**

Retirement planning consultant: **98%**

**Participant satisfaction makes a difference.** Every interaction between a participant and an RPC or our participant call center representative should encourage the participant to take the next best step to improve their retirement readiness and overall financial wellness.

↑  
**26%**

Participants who met with an RPC had an average contribution rate 26% higher than those who did not.<sup>3</sup>



### **PLAN SPONSOR SATISFACTION RATINGS<sup>1</sup>** | We ask our plan sponsors to rate our service, too.

Account manager: **99%**<sup>2</sup>

Client executive: **99%**<sup>2</sup>

Client transition: **92%**

<sup>1</sup>YTD as of June 30, 2023

<sup>2</sup>Large and mega markets only

<sup>3</sup>RPC Dashboard Report/Summary, March 31, 2023

Retirement planning consultants are registered representatives of Transamerica Investors Securities Corporation (TISC), 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.

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