



DRIVING BRIGHTER RETIREMENT OUTCOMES IN HIGHER EDUCATION

A strong faculty and staff is the backbone of your ability to deliver elite academic instruction. Inspire their brighter financial futures with a retirement program that delivers results. We're here to help.

DEDICATED TO A MISSION TO DO RIGHT BY YOU AND YOUR FACULTY AND STAFF

For us, it's personal. We're guided by a bigger mission: to help your faculty and staff live their best lives — now and in retirement. It's a singular focus that guides everything we do — just like it has for more than 85 years — and what's made us one of the largest and most trusted retirement plan providers in the industry.

Top 4
403(b) provider¹

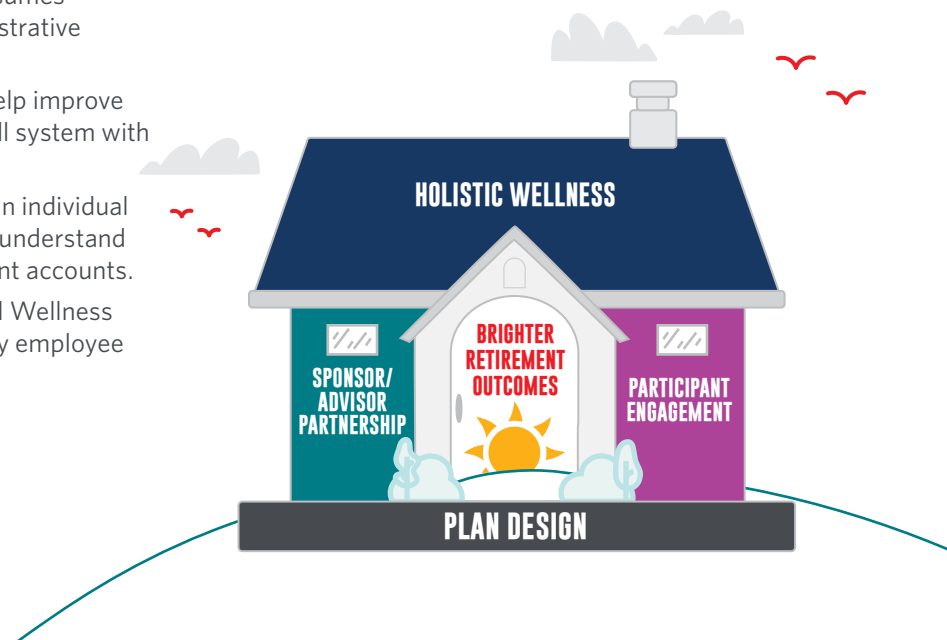
60 years
of not-for-profit experience

20+ years
average not-for-profit client tenure

COMPREHENSIVE PLANS CUSTOM-DESIGNED FOR YOUR INSTITUTION

We're known in the industry for our collaborative and personalized approach to provide "out of the box" solutions aligned to your goals, culture, and needs. We design and administer a retirement plan that is uniquely yours — a plan based on best practices, a deep understanding of market trends, and data.

- **Highly flexible recordkeeping system** enables effective, efficient management across the spectrum of all types of employer-sponsored retirement plans, including: defined benefit, defined contribution, and nonqualified deferred compensation plans
- **As part of our proven process**, Transamerica assumes fiduciary responsibility for the outsourced administrative services we perform on behalf of our clients
- **Our seamless payroll integration capabilities** help improve accuracy and efficiency by integrating your payroll system with our recordkeeping platform
- **Specialized support** for participants with assets in individual contracts. Our transfer specialists can help them understand the pros and cons of consolidating other retirement accounts.
- **Holistic wellness programs**, including a Financial Wellness Center, health savings accounts (HSAs), voluntary employee benefits, student loan assistance, and emergency savings programs



IMPROVING OUTCOMES WITH SIMPLIFIED PLAN ADMINISTRATION

Transamerica offers *Total Retirement Outsourcing*®, a more efficient way to manage multiple plans with benefits for both sponsors and employees. That means one plan provider and one place for participants and plan sponsors to access retirement benefits.

- Receive fully integrated services to meet DB, DC, and NQDC plan needs
- Increase cost savings potential by bundling administration, education, compliance, and investment services for all plans
- Maximize efficiency to reduce workload on your human resources/benefits staff
- Enhance your faculty and staff's experience — and their retirement readiness

INSIGHT, SERVICE SUPPORT & TECHNOLOGY TO ACHIEVE YOUR PLAN GOALS

Through our toolkit of advanced technology and time-tested processes, our relentless focus on measurement, and an experienced team invested in your success, we operate a constant loop of optimization to advance your retirement plan, help you meet your fiduciary obligations, and enable your faculty and staff to achieve their goals and thrive.

- **Your go-to team** every step of the way – From plan design and document services to alternative investment structures to customized communications to the outsourcing of the day-to-day administration of your plan(s)
- **Fully committed to higher education** – To service simply, you need to understand it deeply — and our team does
- **Engaging participants to inspire brighter futures** – Personalized communication, guidance, and support from our education specialists capture faculty and staff attention and sustain engagement to help them reach their goals
- **Proprietary research on retirement plan trends** in higher education to share data and insights, inform best practices and benchmarks, and identify opportunities



Retirement Plan Trends in Higher Education

Our proprietary research studies the latest challenges and trends emerging in the higher education retirement plan landscape — with custom analysis and insights tailored to your faculty and staff.

ENGAGING PARTICIPANTS TO INSPIRE ACTION

Using our proprietary technology, we personalize our communication to send the right message to the right person at the right time and allow participants to choose when and how they want to engage.

- **OnTrack**® Communications Program – Personalized and plan-specific targeted messaging with recommended actions to improve retirement readiness
- **Your Retirement Outlook**® – A personalized forecast indicating the likelihood a participant's investment strategy will produce their desired retirement income



RAINY



CLOUDY



PARTLY SUNNY



SUNNY



75%

of participants with an *OnTrack*® profile have a positive retirement forecast¹

FLEXIBLE, BROAD SUPPORT FOR YOUR FACULTY AND STAFF

From dedicated retirement planning consultants available to hold office hours on site to virtual, phone, and in-person access, our service model reflects the needs and nuances of your faculty and staff.

- Education and guidance
- Personalized advice
- Account support

A REWARDING CULTURE

Building a culture that reflects our values and who we are as an organization is one of our top priorities.



DIVERSITY AND INCLUSION

We're dedicated to fostering an inclusive, inspiring environment for our diverse workforce. That alone is reward enough for us — but the recognition we receive only reinforces the importance of our efforts:

- 2024 Seramount Top 80 Companies for Executive Women
- 2020 - 2024 Seramount 100 Best Companies (formerly Working Mother Media)
- 2019 - 2023 Human Rights Campaign, Corporate Equality Index Perfect Score
- 2020 - 2022 Dave Thomas Foundation Adoption Friendly Workplace
- 2019, 2020, 2022 Diversity Best Practices Inclusion Index
- 2020 Corridor Business Journal Workforce Award
- 2019 EPIC: Most Innovative Initiative Award for work in advancing women leaders



SOCIAL RESPONSIBILITY & CORPORATE CITIZENSHIP

A rich culture that extends to our local communities and beyond.

- In 2023 alone, we donated more than \$7.5 million to deserving organizations through the Transamerica Foundation
- In addition to our Employee Matching Gift program, we offer our employees 12 hours a year of paid time off to volunteer at the organization of their choice

EXPERIENCE THAT COUNTS

Our vision to help protect the livelihoods of American workers is something we live and breathe day in and day out. And after more than 85 years challenging the status quo, you can see the difference in everything we do.



Ready to help your faculty and staff live their best lives?

Connect with a Transamerica representative to see how we can help you build the foundation for brighter retirement outcomes.

 **Visit:** transamerica.com

¹As of June 30, 2024

²"2024 Recordkeeping Survey," PLANSPONSOR, June 2024

Transamerica Retirement Solutions markets or makes available to an independent plan fiduciary of a plan, without regard to the individualized needs of the plan, its participants, or beneficiaries a platform or similar mechanism from which the plan fiduciary may select or monitor investment alternatives, including qualified default investment alternatives, into which plan participants or beneficiaries may direct the investment of assets held in, or contributed to, their individual accounts. By marketing or making available the platform or similar mechanism, Transamerica or its affiliates is not undertaking to provide investment advice or to give advice in a fiduciary capacity. Transamerica does not act as a 3(16) plan fiduciary.

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 do not guarantee future results. Results derived from the tool may vary with each use and over time.

Transamerica has negotiated preferred provider agreements with certain student loan vendors which have agreed to provide favorable pricing and service to Transamerica clients. Transamerica may receive compensation for implementation costs incurred by Transamerica from the vendor on business referred to the student loan benefit provider.

Transamerica is sponsoring financial education programs developed by EVERFI, an unaffiliated third party. Transamerica is not responsible for the content of the financial education program.

Securities offered through Transamerica Investors Securities, 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.

RS3 1697222R2 S 10/24

© 2024 Transamerica Corporation. All Rights Reserved.