



Lesson plans for brighter retirement outcomes

A strong faculty and staff are key to delivering elite academic instruction. Inspire their brighter financial futures with a retirement program that delivers results.

Supporting the people who care for the community

The people who educate tomorrow's leaders are the foundation on which communities are built. We demonstrate our commitment to institutions of higher education with 60+ years serving their retirement plan needs and those of their faculty and staff.

Transamerica serves organizations of every description and every kind of plan. For-profit or not-for-profit, defined contribution, defined benefit, or pooled plan arrangement, we provide resources and solutions to help faculty and staff live their best lives – now and in retirement.

4M
participants¹

27,500+
plans¹

#4
provider in
403(b) plan
assets²

\$246B
in plan assets¹

22+
years average
healthcare
client tenure¹

60+
years of healthcare
industry experience

life in



Comprehensive plans custom-designed for your institution

Our collaborative and personalized approach mean “outside the box” solutions aligned to each client’s goals, culture, and needs. Your plan is uniquely yours, based on industry best practices, market trends, and data. We’ll help ensure it aligns with your objectives, engages your faculty and staff, and delivers meaningful outcomes for your institution with:

- **Highly flexible recordkeeping** that allows efficient management across the spectrum of employer-sponsored retirement plans, including defined benefit (DB), defined contribution (DC), and nonqualified deferred compensation (NQDC) plans
- **Fiduciary protection**, because Transamerica assumes fiduciary responsibility for outsourced administrative services we perform on behalf of certain clients³
- **Seamless payroll integration capabilities** to 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 their retirement accounts.
- **Stable value custom solutions** when you need more than an off-the-shelf fixed option, from an industry leader for more than 40 years
- **Workplace wellness solutions**, including the Financial Wellness Center, health savings accounts, voluntary employee benefits, and a variety of spending and saving solutions

Insight, service, and technology to achieve plan goals

We design retirement plans that are easy to manage, offer flexible support, and help reduce fiduciary risk – so your institution can focus on what matters most.

- **Beside you every step of the way.** Starting with plan design and document services, your seamless, results-driven experience makes plan management easier.
- **Committed to higher education clients.** Long-standing relationships with institutions of higher education reflect our deep commitment to – and understanding of – this vital sector.
- **Engaging participants to inspire brighter futures.** Personalized communication, guidance, and support from our education specialists capture the attention of faculty and staff to sustain engagement and 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 goes beyond data—it delivers custom analysis and actionable insights on the latest challenges and emerging trends in higher education retirement planning. We share these findings to help plan sponsors administer successful plans and ensure we're providing the services faculty and staff truly need.



Simplifying plan administration

Transamerica's *Total Retirement Outsourcing*® (TRO) allows employers to manage multiple plans, smoothing processes and reducing complexities. Participants appreciate viewing multiple plans with a single sign-on for a comprehensive view of their progress toward retirement. With TRO you can:

- Access fully integrated services to meet defined benefit, defined contribution, and nonqualified deferred compensation 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 faculty and staff experience and retirement readiness

Engaging participants to inspire action

The award-winning *OnTrack*® *Communications Program*⁴ is the foundation of our participant communications, with messaging that is:

- Plan-specific, tailored to your plan's design
- Personalized and relevant to the participant's age, career stage, and plan eligibility
- Results-driven, with continuous measurement that tracks engagement through surveys, benchmarking, and analytics

The interactive *OnTrack*® tool produces *Your Retirement Outlook*®, a personalized retirement income forecast that incorporates multiple data points. The tool generates easy-to-understand weather icons to show participants the likelihood of reaching their retirement-income goals, and suggests changes they can make to create a sunnier forecast.

Flexible, broad support for your workforce

From dedicated retirement planning consultants available to hold office hours onsite 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

A supportive culture that sparks creativity leads to solutions that work. Transamerica's employees are passionate about helping clients achieve their goals and are empowered by leadership to apply our diverse talents to drive brighter outcomes.

Diversity and inclusion

2025

Military Friendly® Employer

2024

Disability Equality Index – Best Places to Work for Disability Inclusion

2022-2024

Seramount Top Companies for Executive Women

2019-2024

Human Rights Campaign, Corporate Equality Index for LGBTQIA+ Inclusion

2019-2022

Dave Thomas Foundation Adoption Friendly Advocate

2018-2020, 2022

Seramount Diversity Best Practices Inclusion Index

2018, 2020

Corridor Business Journal Workforce Award

2019

EPIC: Most Innovative Initiative Award for work in advancing women leaders

Social responsibility and corporate citizenship

A rich culture extends beyond company walls to our local communities...and beyond.

- In 2024, we donated more than \$8 million to deserving organizations through the Transamerica Foundation⁵
- 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



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

Connect with a Transamerica representative.



Visit transamerica.com

¹As of December 31, 2024

²"2025 Recordkeeping Survey," PLANSPONSOR, June 2025

³Applies to 403(b) plans and our largest 401(k) plans

⁴MarCom Gold award winner, 2024

⁵ Aegon Transamerica Foundation Report, 2024

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.

Securities offered through Transamerica Investors Securities, LLC (TIS), member FINRA, 440 Mamaroneck Avenue, Harrison, NY 10528.

