



Guidance through life's transitions

Transamerica Transition Services



While change is inevitable, it doesn't need to be stressful. Support your most valuable asset – your employees – through Transamerica's transition services by helping drive brighter retirement outcomes.

Experience you can count on

Employees have direct access to a team of financial professionals who provide personalized guidance and help them make informed decisions during job or retirement transitions.

Our experienced, phone-based professionals are:

- Objective and discreet
- Trained to deliver consistent, quality service
- Licensed in life and health insurance
- Certified Financial Planners™ or Chartered Retirement Planning CounselorsSM

Transamerica's transition services provide access to experienced financial professionals who can help find solutions to real-life challenges.

Certified Financial Planner Board of Standards, Inc. owns the certification marks CFP®, CERTIFIED FINANCIAL PLANNER™ and federally registered CFP (with flame design) in the U.S., which it awards to individuals who successfully complete CFP Board's initial and ongoing certification requirements. Chartered Retirement Planning CounselorSM and CRPC® are registered service marks of the College for Financial Planning®.

Two unique services to support transitioning employees

Retirement transition

Employees 55 and older have access to personalized consultations to help them navigate their transition to retirement. Our financial professionals focus on five key areas:

- 1. **Lifestyle:** How can you make the most of your retirement?
- 2. **Investments:** Are your assets allocated for long-term income?
- 3. **Income:** How much will you need to live comfortably?
- 4. **Healthcare:** Do you have a plan for healthcare coverage in retirement?
- 5. **Estate planning:** How can you safeguard your financial legacy so your loved ones are protected?

Distribution counseling

Employees who experience a job change or layoff can work with a financial professional and receive:

- Education regarding the advantages and disadvantages of their options, including potential tax implications
- Personalized guidance to help them determine the best options for their retirement strategy
- Help evaluating severance, plan-level changes, and any other distributable events

The benefits of smooth transitions

Transitioning employees deserve attention and support when it comes to making decisions about their future. Without adding any strain to your team, Transamerica works to connect with your employees whenever is most convenient for them.

Employees will receive:	You will receive:
Personalized guidance through common workplace transitions	An established program for turnkey implementation
Access to a team of experienced financial professionals	Extension of plan benefits, at no additional cost
Proactive, customized, and relevant communications	Potential increase in plan employee satisfaction

Dedicated to helping employees embrace change

Get in touch to learn more.



Visit **transamerica.com**



Contact **Your Transamerica representative**

Insurance products are underwritten by the insurers and offered through Transamerica Retirement Insurance Agency, Inc. (TRIA), DBA TRIA Insurance Agency in California and New York, and agents associated with TRIA.

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