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Transamerica Connects Wealth + Health to Help Customers Pursue a More Rewarding Life

Transamerica embraces the inherent link between financial and physical well-being to help customers live better today and worry less about tomorrow

Transamerica today announces a new Wealth + Health brand identity focused on helping customers improve their overall well-being by effectively managing both their wealth and their health.

“At Transamerica, connecting the Wealth + Health of our customers is our driving focus. Our objective is to offer simple, sound, and holistic guidance that will help people improve the overall quality of their lives,” said Dave Paulsen, executive vice president and chief distribution officer at Transamerica. “We are excited to lead this movement, because if you are capably managing both your Wealth + Health, you may add more years to your life, and more life to your years.”

Transamerica recognizes that financial security and physical health are not only inherently interconnected, but they are two of the most important components toward living a long, meaningful life – and making wise choices and forming smart habits today, will have an exponential impact on one’s future.

“Applying the link between Wealth + Health, we want to help people reach their goals by showing them ways to build their savings, protect what’s important to them, invest in their futures, and prepare for retirement,” Paulsen explained.

The Intersection of Wealth + Health

Transamerica has developed numerous resources to help customers and financial professionals understand how Wealth + Health are connected, which are featured on its recently redesigned website, Transamerica.com. There, people can access research, education and guidance to learn more about how Wealth + Health come together at a variety of intersections, including:

- Savings and fitness
- Budget and nutrition
- Protection and prevention
- Debt and stress

“Fitness, nutrition, debt, stress, budgeting and countless small daily decisions are all wrapped up in this together,” Paulsen said. “Ultimately, it’s about people striving for a better, more productive life, which is illustrated in our new brand tagline – *Be Well. Build Wealth™*.”

According to a recent study commissioned by Transamerica (Communicating on Wealth and Health, Deloitte Consulting, LLP 2017), the majority of respondents (adults ages 40-65 with an annual household income of at least \$50,000) perceive a viable connection between Wealth + Health. The study offers detailed correlations, including:

- People who have at least \$300,000 saved for retirement by age 55 are 41% more likely to take at least 8,000 steps in a typical day.
- People who use fraud alerts on their credit cards or other financial accounts are nearly twice as likely to regularly participate in moderate to high intensity group exercise classes (such as spinning).



- People who have at least \$1,000 saved in an emergency fund are 46% less likely to often feel it is difficult to focus or concentrate.

Transamerica aims to provide a customer experience and interaction points that help people connect the importance of both Wealth + Health in their lives. Customers are enabled with web-based tools to track and receive guidance on both financial and health goals.

“We plan to enhance our customers’ support structure by enlisting the help of their agents, financial professionals and employers,” Paulsen added. “For more than 100 years, Transamerica has been helping people pursue a lifetime of financial security. Today, that’s about so much more, because your health has such an important role in your overall well-being – now and in the future. Transamerica is a partner in helping people live the life they want.”

View Transamerica’s short video introducing the [Wealth + Health initiative](#).

About Transamerica

With a history that dates back more than 100 years, Transamerica is recognized as a leading provider of life insurance, retirement and investment solutions, serving millions of customers throughout the United States. Recognizing the necessity of health and wellness during peak working life, Transamerica’s dedicated professionals work to help people take the steps necessary to live better today so they can worry less about tomorrow. Transamerica serves nearly every customer segment, providing a broad range of quality life insurance and investment products, individual and group pension plans, as well as asset management services. In 2016, Transamerica fulfilled its promises to customers, paying more than \$7.2 billion in insurance and annuity benefits, including return of annuity premiums paid by the customer. Transamerica’s corporate headquarters is located in Baltimore, Maryland, with other major operations in Cedar Rapids, Iowa. Transamerica is part of the Aegon group of companies. Based in the Netherlands, Aegon is one of the world’s largest providers of life insurance, pension solutions and asset management products, operating in more than 20 markets worldwide. For the full year of 2016, Aegon managed \$784 billion in revenue generating investments. For more information, please visit www.transamerica.com.

About the Survey

“Communicating on Wealth and Health, Deloitte Consulting LLP 2017” was conducted with a national, web-based survey. Respondents were asked to report their behaviors and opinions on the topics of wealth and health. The data was used to determine what statistical correlations between wealth and health exist, and provide recommendations on what will likely resonate with and, be credible to, consumers. All conclusions in the report are based on 1,000 full survey completions. Respondent composition was mapped to represent the national US Census data, including regional distribution, for a sample population of US adults ages 40-65 with a total household income of \$50,000 or more.

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