



## **FOR IMMEDIATE RELEASE**

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### **New Transamerica Survey Shows Investors Identify Health as Key Component to Their Financial Planning and Security**

*Latest research-based insight also provides communications guidance for successful financial planning*

New research results gathered by Transamerica indicate that the majority of investors want their financial advisors to factor in health matters while building their financial future, and that effective communication between investors and their advisors is a key component in successful retirement planning.

The findings are based on collaborative research between Transamerica and the independent Luntz Global Partners, which included focus groups held across the country, as well as data gathered in a 2016 survey of 1,000 adults across the U.S. with a minimum annual household income of \$75,000 and investable assets of at least \$50,000.

A primary recurring theme from the consumer survey is the inherent relationship between health and wealth, with 81 percent of respondents indicating it would be “very valuable” or “extremely valuable” for a financial advisor to consider their health and potential health care expenses when building their financial strategy. And when asked what is most essential to their financial future, health was by far the most popular response (37%) – outpacing happiness (19%), security (19%) peace of mind (16%) and independence (9%).

“Being aware that health is of paramount importance to clients in building their financial security, advisors should use that knowledge to suggest solutions that take into account the full scope of their essential long-term needs,” said Dave Paulsen, Transamerica’s chief sales officer.

Using the survey data, Transamerica has published a new resource for advisors – “The Transamerica Guide to Effectively Engaging Clients” – that provides insight, guidance and strategies on how advisors can best communicate and connect with their clients to build stronger, longer-lasting relationships.

“It’s clear that better conversations result in healthier and stronger relationships between advisors and clients when discussing their finances and financial future,” Paulsen said. “Effective dialogue is essential in building trust and demonstrating value in order to deliver positive outcomes.”

The “Transamerica Guide to Effectively Engaging Clients” is available to financial professionals on Transamerica’s [New Age of Advice website](#) or by calling Transamerica at 866-824-8698.

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#### **About Transamerica**

With a history that dates back more than 100 years, the Transamerica companies are recognized as leading providers of life insurance, savings, retirement and investment solutions, serving millions of customers throughout the United States. Transamerica works to Transform Tomorrow® for those who entrust its dedicated professionals with their financial needs, helping them take the necessary steps to achieve their long-term goals and aspirations. Transamerica’s 10,000 employees serve nearly every customer segment, providing a broad range of quality life insurance and savings products, individual and group pension plans, as well as asset management services. In 2015, Transamerica fulfilled its promises to customers, paying



more than \$6.9 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. 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 2015, Aegon managed \$768 billion in revenue generating investments. For more information, please visit [www.transamerica.com](http://www.transamerica.com).

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