



## **FOR IMMEDIATE RELEASE**

BALTIMORE – January 10, 2022

### **Transamerica Debuts Value-Focused Retirement Plan Solution for Small Employers**

Transamerica today announced the availability of a new packaged solution explicitly designed for small companies seeking to start a new workplace retirement plan for their employees. The *Transamerica Advantage Solution*<sup>SM</sup> is a configurable retirement plan solution that combines all the technical expertise and participant services designed to operate a workplace retirement savings program efficiently. Plan sponsors will work with their financial advisor to choose a service and investment menu that best fits their needs.

“Transamerica is a pioneer and long-time advocate for small employers. Like never before, we are leaning into the needs of smaller employers that want a single employer plan,” said Darren Zino, Senior Managing Director of U.S. Retirement Distribution at Transamerica. “The *Transamerica Advantage Solution* offers small employers the ability to choose from all the best features that we offer, along with attractive pricing.”

From initial plan design choices to ongoing administration, the *Transamerica Advantage Solution* allows configuration that includes:

- Choice of administration providers: Employers may elect to use the expert administrative services of a third party administrator. Many small employers desire the unique benefits provided by a third party administrator that knows their company and its objectives.
- Choice of fiduciary services: Employers may elect 3(21) investment advisory services or more comprehensive 3(38) investment management services from an independent provider.
- Choice of an investment menu: Employers may choose a Transamerica target-date series based on asset class goals and objectives. Options include active, passive, or blended underlying investment strategies with American Funds, BlackRock, and J.P. Morgan.
- Qualified Default Investment Alternative (QDIA) options designed to drive brighter retirement outcomes for plan participants.

“The creation of the *Transamerica Advantage Solution* comes from our listening to small employers about their needs, along with our unique perspective that comes with decades-long experience in helping organizations grow and thrive,” said Mr. Zino.

To learn more about the *Transamerica Advantage Solution*, call 888-401-5826.

#### **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 2020, Transamerica fulfilled its promises to customers, paying more than \$49 billion in insurance,



retirement, and annuity claims and 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 and Denver, Colorado. Transamerica is part of the Aegon group of companies. Based in the Netherlands, Aegon is a diversified financial services group focused on providing investment, protection, and retirement solutions. For the full year of 2020, Aegon managed over \$1.1 trillion in revenue generating investments. For more information, visit [www.transamerica.com](http://www.transamerica.com).

The Funds are offered through the Transamerica Retirement Solutions Collective Trust, for which Massachusetts Fidelity Trust Company (MFTC) is the Trustee. Because the investment options available under a collective trust are exempt from SEC registration, a prospectus is not available with respect to such investment options. However, a Disclosure Statement is available for the Funds. The current Disclosure Statement contains additional information that should be carefully considered before choosing a Fund, including information about each Fund's investment objective, strategies, expenses, performance, and risks. The Funds are not insured by the FDIC, Federal Reserve Bank, nor guaranteed by MFTC or any affiliate.

Investment advisory services offered through Transamerica Retirement Advisors, LLC, registered investment advisor. Transamerica does not act as a 3(16) plan fiduciary. All Transamerica companies identified are affiliated.

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