



News

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Transamerica Retirement Services' Enrollment Kit Earns First Place Industry Award for Participant Education

Pensions & Investments' "Eddy Award" recognizes kit for being easy to read and presenting information in a strategic and logical order

LOS ANGELES – April 7, 2008 – Transamerica Retirement Services today announced that it earned a first place “Eddy Award,” by *Pensions & Investments* (Issue date: March 17, 2008) magazine, for its redesigned enrollment kit. The award was given in the “Initial Education – Generic” category.

Pensions & Investments recognized the enrollment kit for being easy to read and complete with good information presented in a strategic and logical order. *Pensions & Investments* commended the use of projections and simple-to-follow tables in the workbook to help employees estimate how much they will need at retirement, how much their current savings will be worth at retirement, and how much they should contribute to meet their retirement savings goals.

“Transamerica is dedicated to making our enrollment kit easier to understand and use for our customers,” said Sheila Wales, vice president of Education Services for Transamerica Retirement Services. “We are consistently focused on offering our clients the best educational materials available in the industry and the Eddy Award validates our efforts.”

Transamerica’s redesigned kit offers participants a simple, linear enrollment process, starting with general financial education, followed by risk assessment and retirement savings goals, and concluding with investment selection and enrollment. The new kit offers easy-to-follow savings tables, shortened enrollment forms, and provides employees with the simplest investment choices—such as target date funds which have asset allocation and diversification built into them—first.

This is the first year *Pensions & Investments* recognized plan providers for excellence in employee investment education. Previous years’ entries were limited only to plan sponsors.

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About Transamerica Retirement Services

Transamerica Retirement Services (“Transamerica”), a marketing unit of Transamerica Financial Life Insurance Company, 4 Manhattanville Road, Purchase, New York 10577, and other of its affiliates, designs customized retirement plan solutions to meet the unique needs of small- to mid-sized businesses.

Transamerica Retirement Services ranked as the top plan provider¹ in a recent *PLANSponsor*[®] *Magazine* Defined Contribution Survey and has more than 14,500² retirement plans totaling more than \$16.5² billion in assets. For more information about Transamerica, please refer to **www.TA-Retirement.com**.

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¹Transamerica Retirement Services received 39 “Best in Class” cups for sponsor and participant services in *PLANSponsor*[®] *Magazine*’s annual Defined Contribution Survey of retirement plans. The 39 Best in Class designations—21 in the micro (<\$5 million) and 18 in the small (\$5 million to \$50 million) markets—rank Transamerica Retirement Services number one for cup recipients among the 44 providers evaluated in the micro- and small-plan markets. The results of the Defined Contribution Survey were announced in the November 2007 issue of *PLANSponsor*[®] *Magazine*. The survey polled nearly 5,500 clients of 48 defined contribution plan providers. “Best in Class” cups are awarded to plan providers who score in the top quartile of a specific category. See the November 2007 issue of *PLANSponsor*[®] *Magazine* for complete results.

²As of December 31, 2007.