

POSITIONED FOR THE FUTURE



We've been in the employee benefits business for nearly 90 years, supporting over 18,000 employers and insuring over 1 million lives. And we're more committed than ever to provide you with efficient, comprehensive solutions.

“Transamerica measures success by the number of brokers who trust us to serve their clients, and the number of working Americans that have the means to achieve healthier, more financially secure lives with help from our benefits.”

– John Stanley MANAGING DIRECTOR, EMPLOYEE BENEFITS

That's why we're making major investments in three key areas — so we can deliver better outcomes for you and those you serve, and raise the bar for the industry as a whole.

1 IMPROVING YOUR EXPERIENCE

We're committed to providing a best-in-class process that's streamlined and simple, so you can keep doing more business. We work to meet your needs — not the other way around.



PLATFORM FLEXIBILITY

We'll work with any benefit administration platform — and our list of existing partnerships is growing.



SELF-ADMINISTRATION

Let us do the lifting. Reduce hassles and errors with true self-administration streamlined billing and reconciliation. Plus, we're consistently expanding to more self-administered products in more states.



BUNDLING

From supplemental health to life insurance, bundling our products can provide more comprehensive protection for employees. And it means you can sell more with less paperwork.



EVER-IMPROVING CLAIMS

With shorter turnaround times on claims and an improved escalation process for issues, we're positioned to solve client challenges quickly. We're also providing quicker payments to employees through direct deposit.



ENROLLMENT EASE

Our flexibility lets us support any type of enrollment process that works for your clients and their employees. Use your own enrollment form, hire an enrollment firm, use our proprietary systems, or take advantage of our universal file — anything to make your job easier.

“Our investments in people and platforms are driving dramatic improvements in process.”

– Ching Wang

SENIOR DIRECTOR OF WORKPLACE SOLUTIONS
OPERATIONS AND STRATEGY



TRANSAMERICA®

2 INVESTING IN PEOPLE TO DRIVE YOUR SUCCESS

We're rapidly expanding our operational teams in Norwood, Massachusetts, as well as our pre-sales and marketing teams in Denver, Colorado.

These dedicated teams ensure you have access to the resources needed to do business.



Knowledgeable pre-sale support to:

- Ensure you're easily appointed with Transamerica
- Ensure enrollment data is clean and participation requirements are met
- Walk you through reports and tools available to help you make sales

Strengthening operations to:

- Understand and meet the needs of our brokers, clients, and distribution partners
- Quickly address disruptions and escalations in real-time
- Ensure service expectations are understood and implemented

Ongoing support teams take care of you and your clients by:

- Making sure the enrollment platform is set up and working
- Checking policy documents for missing information and filling in any gaps
- Welcoming your clients to Transamerica with welcome calls and emails
- Handling billing, reconciliation, and addressing any issues that come up when we are provided with a register of deductions

Expanded marketing support that:

- Creates more materials that help you close business
- Develops enrollment communications that help increase participation
- Shows the value Transamerica brings to you and your clients

3 EXPANDING COMPREHENSIVE SOLUTIONS FOR THE FUTURE

We're committed to expanding and improving our suite of products so we can help employers offer the benefits their employees are really asking for.



Growing Suite of Employee Benefits Products

We're focusing on expanding our supplemental offerings, such as student loan assistance, to give employees what they're asking for — while making your job easier.



BENEFITS SHERPA®

Our tailored reports are designed to help you recommend the right products to the right clients — identifying what employees actually want and need.



Wealth + HealthSM Educational Content

Our research-based insights prioritize employees' overall quality of life, helping them protect their wealth while caring for their health.

Want to learn more?

Call your representative for more information.



Contact: 800-851-7555 option 4

Insurance products underwritten by Transamerica Life Insurance Company or its affiliates.

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