Transamerica℠

Disrupting the retirement landscape

Multiple Employer Plan (MEP), Pooled Employer Plan (PEP), *Group Plan Solution*℠ (*GPS*), and *Retirement Plan Exchange*® solution

Transformation starts with Transamerica

Pooled plans are becoming part of the retirement mainstream. As one of the first to make them a significant part of our business, Transamerica has relentlessly championed pooled plan solutions for more than two decades. We saw their potential as a way to expand retirement coverage as the retirement landscape continues to evolve and the number of Americans covered by pension plans declines.

The variety of pooled plan types now available gives employers of all sizes the ability to join together and gain access to fiduciary outsourcing, plan administrative support, and potential cost savings, offering them a high-quality retirement plan that might otherwise be out of reach. Transamerica can help determine the best pooled plan structure for each employer's unique needs.

Transforming lives by transforming access

Transamerica's commitment to the qualified retirement plan market runs deep. We work hard to help people live their best lives and believe everyone should have access to a workplace retirement plan. That's why we created unique solutions, available to employers of every scale and type, that helped shape the modern pooled retirement plan landscape.

To make it easy for employers and employees to reap the benefits, we developed a practice that includes a proven, time-tested recordkeeping system designed specifically for pooled plans. Our support structure provides access to dedicated teams across various disciplines, including installation, compliance, administration, client management, sales, and marketing.

24 years
pooled solutions experience

#1
plan provider
of total adopting employers in PEPs[1]

Dedicated
team of specialists

Proven recordkeeping platform
designed for pooled plans

Driving
legislative change

Driving change from inside the Beltway

Introducing a revolutionary new plan model was just the beginning. We needed systemic change to reach the widespread adoption and access that could truly change lives and financial futures. So, Transamerica went to Washington.

Driven by our shared purpose and passion to make workplace retirement plans more accessible, senior leaders within Transamerica worked with the Department of Labor (DOL) and members of Congress to shape policy and craft provisions to expand access to retirement plans. Our advocacy and active dialogue with regulators and lawmakers drove legislative change, improved regulatory outcomes, and allowed us to represent the voices of small employers and American workers with regard to retirement planning.

Transamerica – an industry leader you can trust

When you combine our unwavering commitment and passion with our deep experience and resources, it's clear why Transamerica is the premier recordkeeping partner for pooled plans and beyond.

L

Leading experts

Advocate for pooled solutions at national level for **24 years**

E

Experienced partners

Pooled plan arrangement experience: **454** plan sponsors; **17,583** adopting employers; **$25B** in pooled plan assets*

A

Affordable solutions

Flexible options of all plan types: **MEPs, PEPs, and Group of Plans**

D

Dedicated support

Consultative services to help clients and partners find strategies to achieve goals and ongoing plan growth and support

E

Enhanced outcomes

Proven record of improving participants' retirement readiness

R

Recordkeeping specialists

Time-tested recordkeeping platform developed specifically for pooled plans to track both individual plans and aggregate level

Get in touch.

Contact us for consultation on the best pooled plan arrangement for your client:

Call **866-393-8967**

Email **pooledplansales@transamerica.com**

Visit **transamerica.com**

*As of Dec. 31, 2024

[1] "2025 Recordkeeping Survey," PLANSPONSOR, June 2025

Before adopting any plan, you should carefully consider all of the benefits, risks, and costs associated with a plan. Information regarding retirement plans is general and is not intended as legal or tax advice. Retirement plans are complex, and the federal and state laws or regulations on which they are based vary for each type of plan and are subject to change. In addition, some products, investment vehicles, and services may not be available or appropriate in all workplace retirement plans. Plan sponsors and plan administrators may wish to seek the advice of legal counsel or a tax professional to address their specific situations.

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