



News

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Transamerica Launches 401(k) Business Building Workshop for Financial Advisors

Audio workshop provides advisors with tools to successfully build and maintain profitable retirement plan business

LOS ANGELES – June 22, 2009 – Transamerica Retirement Services today announced a new tool to help financial advisors build and maintain profitable business in the growing small-plan retirement market. This CD audio workshop, titled, “401(k) Business Building Workshop for Financial Advisors,” provides advisors with tools or solutions that can be immediately implemented into their business development efforts and help them take advantage of the opportunities available in the 401(k) plan market.

“Transamerica is committed to delivering value to financial advisors by providing them with the tools to help them build their retirement plan business,” said Stig Nybo, president of Transamerica Retirement Services. “Having worked with some of the retirement industry’s most successful financial advisors, Transamerica has a deep understanding of how beneficial a well-structured 401(k) plan practice can be for all involved. The 401(k) Business Building Workshop gives advisors access to this knowledge so that they can take advantage of the tremendous opportunities to expand their business.”

The hour-long audio workshop is divided into seven distinct topics to help advisors understand the opportunities in the 401(k) market and walk them through strategies that they can immediately use to successfully build their business. The seven workshop topics include:

1. Why sell a 401(k)?
2. Define your 401(k) value proposition.
3. Identify your target prospect and learn where to find them.
4. Learn creative prospecting and prospect tracking.
5. Plan your approach.
6. Effectively communicate your value and follow-up.
7. Our coaching and accountability.

“The 401(k) Business Building Workshop for Financial Advisors allowed me to begin carving out a clear and concise value proposition for targeting clients in the 401(k) plan space,” said Steven Musmanno, financial advisor and partner with Professional Planning Services, LLC. “We have always found that the 401(k) market is a great opportunity. The workshop reinforced those opportunities and provided clear rationale for increasing exposure to this market. The workshop does a good job of laying out an actionable, step-by-step approach in a structured format that was valuable in helping to build a business plan for the retirement plan market.”

Financial advisors who are interested in receiving the Business Building Workshop CD can call the Internal Sales Desk at (888) 401-5826 from 7 a.m. to 5 p.m. Eastern Time Monday through Friday to

request a copy. Advisors who have previously worked with Transamerica Retirement Services can also download the audio files at www.TA-Retirement.com.

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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 among the top plan providers¹ in a recent PLANSponsor[®] Magazine Defined Contribution Survey and has more than 15,000² retirement plans totaling more than \$13.2² billion in assets. For more information about Transamerica, please refer to www.TA-Retirement.com.

¹ The November 2008 PLANSponsor[®] Magazine Defined Contribution Survey results place Transamerica Retirement Services among the top providers out of 52 for retirement plans with up to \$50 million in assets based on total number of cups won. See the November 2008 issue of PLANSponsor[®] Magazine for complete results.

² As of December 31, 2008.

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