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## **Transamerica Ranks as #1 Retirement Plan Provider in Latest DC Survey**

39 “Best in Class” cups ranks highest among all providers in the combined micro- and small-plan markets in annual *PLANSPONSOR*<sup>®</sup> Magazine Survey

Transamerica’s 99 percent recommendation rate ranks the highest of any plan provider

**LOS ANGELES – November 20, 2007** – In the results from the latest Defined Contribution (DC) Survey conducted by *PLANSPONSOR*<sup>®</sup> Magazine, Transamerica Retirement Services (“Transamerica”) was honored by retirement plan sponsors for its ongoing commitment to excellent customer service.

Transamerica received 39 “Best in Class” cups for sponsor and participant services in *PLANSPONSOR*<sup>®</sup> Magazine’s annual DC 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 as the number one cup recipient among the 44 providers evaluated in the small- and micro-plan markets. The new DC Survey also ranks Transamerica’s overall service scores in the top quartile for both participant and sponsor services in both market segments for which the company serves.

99 percent of Transamerica’s clients who responded indicated that they would recommend the firm to a colleague—this marks the highest percentage of any provider that participated in the survey. Anonymous responses from clients include:

*“Our provider ALWAYS provides excellent service, often going above and beyond expectations.”*

*“The level of commitment to making sure things work is very high. Quick – Efficient Service.”*

*“Transamerica is overall easy to understand.”*

*“With the Web site and the phone center participants have excellent information.”*

*“Very resourceful personnel we have and quite knowledgeable. Always available, very responsive, always accurate and proactive regarding our needs.”*

“Transamerica’s dedication to offering the most effective and comprehensive retirement plan programs available in the market today is evident through our continued success in *PLANSPONSOR*<sup>®</sup> Magazine’s DC Survey,” said Kent Callahan, president and CEO of Transamerica Retirement Services.

“Transamerica diligently works to expand and improve its services, enabling financial advisers the ability to ensure that plan sponsors and participants can make the most of their retirement plan.”

## **BEST IN CLASS CUPS**

Transamerica received 39 “Best in Class” cups, covering 22 categories:

### ***Participant Services***

- Communications materials (micro- and small-plan markets)
- Education program (micro- and small-plan markets)
- Statement clarity (micro- and small-plan markets)
- Enrollment Assistance (micro- and small-plan markets)
- Asset allocation focus (micro- and small-plan markets)
- Statement Accuracy (micro-plan market)
- Reporting timeliness (micro-plan market)
- Turnaround time—Loans (micro- and small-plan markets)
- Participant Internet services (micro- and small-plan markets)
- Call center (micro-plan market)
- Range of investments (micro- and small-plan markets)
- Retiree services (micro- and small-plan markets)
- Participant Service Fees (micro-plan market)

### ***Sponsor Services***

- Sponsor Internet Services (micro- and small-plan markets)
- Form 5500 accuracy (micro- and small-plan markets)
- Reporting (micro- and small-plan markets)
- Compliance (small-plan market)
- Fee fairness (micro- and small-plan markets)
- Account representative knowledge (micro- and small-plan markets)
- Regulation updates (micro- and small-plan markets)
- Responsiveness (micro- and small-plan markets)
- Staff consistency (micro- and small-plan market)

### ***About the November 2007 PLANSPONSOR® Magazine Survey***

The results of the DC Survey were announced in the November 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 that score in the top quartile of a specific category.

### **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 provider<sup>1</sup> in a recent *PLANSPONSOR® Magazine* Defined Contribution Survey and has more than 14,500<sup>2</sup> retirement plans totaling more than \$14.1<sup>2</sup> billion in assets. For more information about Transamerica, please refer to [www.TA-Retirement.com](http://www.TA-Retirement.com).

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<sup>1</sup> The November 2007 *PLANSPONSOR® Magazine* Defined Contribution Survey results place Transamerica Retirement Services as the top provider out of 44 for retirement plans with up to \$50 million in assets based on total number of cups won. See the November 2007 issue of *PLANSPONSOR® Magazine* for complete results.

<sup>2</sup> As of December 31, 2006.