AN EXPERIENCED TEAM

MEET THE MANAGERS

We live in a world that demands flexible financial strategies. People can expect to live longer than in decades past, and that brings opportunities. It also means people need to plan for more expenses throughout life and retirement, including higher healthcare costs.

Sound financial advice can be valuable when navigating the challenges ahead. Luckily, the Transamerica® ONE wealth management platform includes more than 50 investment strategies run by experienced money managers in all asset classes. Each of our money managers uses either active or passive strategies to help you pursue your goals, regardless of how the market turns.

Certain asset classes may perform better with active management[1]

MEET THE MANAGERS

TRANSAMERICA® FINANCIAL ADVISORS, INC.

We bring a different perspective to the financial services industry by encouraging clients to focus on their Wealth + Health℠ and providing the strategies to do it. We know our clients will face varied challenges throughout life. That's why we create portfolios that are dynamic enough to help them prepare for the future.

CALAMOS® INVESTMENTS

CONNING®

NASDAQ DORSEY WRIGHT

HANLON INVESTMENT MANAGEMENT, INC.

MANNING & NAPIER®

PINNACLE Advisory Group, Inc.

SUMMIT GLOBAL INVESTMENTS

[1] "Here's Where Active Management Actually Works," Institutional Investor, April 2019

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TRANSAMERICA®

STRATEGIES

Strategic

A buy and hold approach that invests in securities according to long-term target weights. The portfolio is periodically rebalanced back to these target weights.

Tactical

A dynamic approach whose investments are changed over short and intermediate time frames in an attempt to capture market gains or reduce the size of market losses.

Socially Responsible

An approach whose investments are chosen based on environment, social and governance (ESG) criteria. ESG criteria typically avoid tobacco, weapons manufacturing and other socially questionable businesses.

ACCOUNTS

- Individual
- Trusts
- Custodial (UGMA, UTMA)
- IRA
- ROTH IRA
- Simple IRA
- SEP IRA
- Beneficiary IRA
- Joint Accounts
- Corporate Accounts
- Qualified Retirement Plans

ASSET TYPES

- Stocks (U.S & International)
- Government Bonds (U.S. & International)
- U.S. Corporate Bonds
- U.S. Municipal Bonds
- Commodities
- Real Estate (REITs)

Contact your advisor to find the strategy that's right for you.

VISIT
Transamerica.com

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The information contained herein has been prepared without regard to any particular investor's investment objectives, financial situation, and needs. Investors are advised to consult with their investment professional about their specific financial needs and goals before making any investment decisions. Asset allocation, like many investment strategies, offers no guarantee of positive returns, and are subject to market risk, including loss of principal.

The strategies herein are available in Transamerica ONE accounts. Transamerica® ONE accounts are investment advisory accounts. While advisory accounts do not charge commission for each transaction, there is an advisory fee charged as a percentage of the total value of assets in the advisory account. When helping customers determine whether an advisory or brokerage account may be right for them, consider the differences between the accounts in terms of the level of trading activity, costs and fees, services provided, and obligations to the client. Investment Advisor Representatives must adhere to a higher standard of fiduciary responsibility. That is, there is an ethical and legal requirement that the investor's best interests come first. There are additional factors that may affect the overall return. For a complete description of all fees, costs and expenses please refer to the ADV part 2A Appendix 1.

Assets in a Transamerica ONE account are held at FOLIOfn Investments, Inc., a SEC registered broker dealer, member FINRA and SIPC. TFA and FOLIOfn are not affiliated companies. Securities and Investment Advisory Services offered through Transamerica Financial Advisors, Inc. (TFA), Member FINRA, SIPC and Registered Investment Advisor. Headquarters: 570 Carillon Parkway, St. Petersburg, FL 33716. Phone: 770.248.3271

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