

### **Transamerica Retirement Services Earns Dalbar Seal of Excellence for its Statement and Web Sites**

Boston, MA (February 13, 2009) – Dalbar, Inc. announced today that Transamerica Retirement Services', a marketing unit of Transamerica Financial Life Insurance Company, was awarded the Dalbar Seal of Excellence for Communications for its Defined Contribution Plan Statement and its Defined Contribution Plan Participant and Plan Sponsor Web sites, at **www.TA-Retirement.com**. The seal is awarded to outstanding communications that effectively and efficiently meet the needs of both the plan sponsors and plan participants. Before awarding the seals, Dalbar conducts a series of tests on the statement and Web site's to establish that they meet the principal objectives of its audience.

The results of these tests indicate that the Transamerica Defined Contribution Plan Statement successfully meets the requirements of its participants, and is outstanding in:

- Presenting information that allows the participant to understand their holdings in a manner that is clear and understandable.
- Providing information that affects the account value and allocation at a detailed level.
- Presenting critical information using industry-leading practices such as long-term hypothetical scenarios and a format that highlights the most important information for the participant.

This is the fourth consecutive year that Transamerica's Web sites earned the DALBAR Communication Seal. Over the last four years, Transamerica has made consistent improvements to both Web sites. The highlighted features of Transamerica's plan participant Web site include:

- Enabling participants to be involved with their plan from enrollment through retirement.
- The participant can access their balances, personal rate of return, transaction history and other account specific details.
- The site offers participants extensive details of their employer's 401(k) plan, allowing for a thorough understanding of its benefits; as well as a help section that ensures participants are able to get the most from accessing their plan online.

The highlighted features of Transamerica's plan sponsor Web site include:

- Allowing plan sponsors to perform administrative tasks such as the submission of contribution files and approval of employee distribution requests.
- Offering extensive reporting features as well as capabilities for compliance testing.
- Plan sponsors may perform a wide variety of functions on behalf of participants, including requesting withdrawals and changing deferral rates.

"Dalbar's recognition of our Web site and plans statement is the result of Transamerica's dedication to providing sponsors and participants with the resources they need to make informed retirement planning decisions," says Stig Nybo, senior vice president and chief marketing officer for Transamerica Retirement Services. "It is our mission to consistently

develop industry-leading tools that offer added levels of value to our clients.”

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**Dalbar, Inc.**, the nation’s leading financial-services market research firm, continues its nearly three-decade commitment to raising the standards of excellence in the industry. With offices in the U.S. and Canada, Dalbar develops standards for, and provides research, ratings, and rankings of intangible factors that influence the overall customer-service experience in the mutual fund, broker/dealer, managed account, retirement plan, life insurance, and property and casualty insurance industries; such factors include print communications, Internet, interactive voice response, call center, and financial-professional touch points. [www.dalbar.com](http://www.dalbar.com).

#### **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 providers<sup>1</sup> in a recent PLANSPONSOR® Magazine Defined Contribution Survey and has more than 15,000<sup>2</sup> retirement plans totaling more than \$13.2<sup>2</sup> billion in assets. For more information about Transamerica, please refer to [www.TA-Retirement.com](http://www.TA-Retirement.com).

<sup>1</sup> 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.

<sup>2</sup> As of December 31, 2008.

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