

## Media Fact Sheet

### **Media Contacts:**

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SecurePath<sup>SM</sup> by Transamerica,

A service offered through Transamerica Retirement Management, Inc.

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### **Vitals**

- **Division:** Transamerica Retirement Management, Inc. is a marketing affiliate of Transamerica Life Insurance Company, Transamerica Financial Life Insurance Company and Transamerica Occidental Life Insurance Company. Securities and Investment Advisory Services offered through InterSecurities, Inc., member FINRA, SIPC and Registered Investment Advisor.
- **Brand:** SecurePath<sup>SM</sup> by Transamerica
- **Founded:** founded in 2006; service launch in Q2 2007
- **Web site:** [www.securepathbytransamerica.com](http://www.securepathbytransamerica.com)
- **Headquarters:** Transamerica Retirement Management, Inc., Suite 230408 St. Peter Street, St. Paul, MN 55102
- **Employees:** Approximately 40, including 8 Financial Advisors who are Registered Representatives and Investment Advisor Representatives with InterSecurities, Inc.
- **SecurePath Answer Center:** toll free 1 (866) 300-0028, 8:30 a.m. to 5:30 p.m., M-F

### **What SecurePath by Transamerica Does**

SecurePath<sup>SM</sup> by Transamerica, a service offered through Transamerica Retirement Management, Inc. (TRM), provides financial and life-transition guidance to the nation's approximately 79 million baby boomers – those who are in or about to enter retirement. Headquartered in St. Paul, Minn., TRM is a business unit of Transamerica Life Insurance Company. Its consumer-facing brand was launched as SecurePath<sup>SM</sup> by Transamerica.

### **SecurePath by Transamerica Focus & How It's Different**

Most of the retirement industry is focused on helping consumers accumulate retirement assets. TRM by way of SecurePath<sup>SM</sup> by Transamerica, focuses on helping consumers turn those retirement assets into a reliable income stream. The company also devotes resources to helping boomers better understand and anticipate many of the non-financial challenges of this transition. In aligning itself with forward-thinking industry associations, SecurePath<sup>SM</sup> by Transamerica is on the leading edge of retirement issues, trends and developments. Its deep understanding of retirement issues and life-planning is used to develop products, services and people to provide boomers with the education and resources to help make their pension, 401(k) and other savings last throughout retirement.

## Products and Services

SecurePath<sup>SM</sup> by Transamerica serves consumers who want to preserve their standard of living, protect against unforeseen costs and avoid complicated retirement planning. It offers products and services that educate consumers on retirement-transition planning, provide them with a source of post-retirement income, and help protect that income from unnecessary risk.

## Education

- **Online Retirement Education** - SecurePath<sup>SM</sup> by Transamerica maintains a wealth of information on its SecurePath Answer Center on the web, all devoted to a broad range of retirement transition challenges, not just the financial ones.
- **Financial Advisors** - SecurePath<sup>SM</sup> by Transamerica has Financial Advisors who staff the St. Paul-based SecurePath Answer Center. Each advisor is qualified to educate customers and provide valuable retirement advice and guidance. They listen to the customer's individual goals and financial objectives, and then help to create a retirement strategy for each client.

## The Leaders of the Division

The key leaders of SecurePath<sup>SM</sup> by Transamerica consist of industry veterans from Fortune 500 companies in the following industries: Retirement Services, Insurance Policy Procedure, Financial Services and Planning, and Information Technology (See executive bios).

The executive team includes:

- Phil Eckman, president and CEO
- Will Prest, chief marketing officer
- Susan Leatherwood, chief information officer
- John F. McCormack, Jr., chief operating officer
- Robb Kempken, executive vice president, strategic planning
- Mark Luis Foster, vice president, director of marketing, communications and brand management

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