

TRANSAMERICA[®] ONE

WEALTH MANAGEMENT PLATFORM

THE PLACE TO INVEST



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TRANSAMERICA[®]
FINANCIAL ADVISORS, INC.

SEE THE FUTURE THROUGH A WHOLE NEW LENS



AN ADVANCED INVESTMENT PLATFORM THAT'S EASY TO USE

What are you saving for? There are countless reasons to prepare for the future — to fund a desired retirement, pay down a mortgage, or cover healthcare costs — just to name a few. A sound financial future looks different to everyone, but sound financial advice is helpful to anyone.

Professional money management could be a great way for you to pursue your financial goals. The Transamerica ONE Wealth Management Platform can give you access to sophisticated management strategies even if you only have a modest amount to invest.

Investors can access institutional and boutique, third-party portfolio managers through Transamerica ONE for a **minimum investment of \$25,000**. The platform connects you, your investment advisor representative, custodian, and portfolio managers all in one place so that you're always in control of your investments.

A STRAIGHTFORWARD PROCESS



WHY IT WORKS

Transamerica Financial Advisors bring more than 30 years of experience to the table and the platform was built to leverage that wealth of knowledge. Transamerica ONE was assembled thoughtfully with investors in mind. It's an advisory account that offers access to multiple investment strategies in a single, separately managed account that is customizable to different needs. This means you have a rare opportunity in an industry where it typically takes a large account to access professional money management. With multiple strategies available from boutique firms, your advisor can work directly with your money managers to assemble a portfolio that is designed to meet your risk tolerance and gives you a chance to accomplish your specific goals. After all, you're unique — your portfolio should be too.

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CAPABLE

An investment platform should come with the features you need. Take advantage of:

- Online access to accounts
- Fractional share trading and diversification
- Digital statements and tax reports
- Exclusive, proprietary technology
- Customizable allocations



CONFIDENT

Financial advice needs to keep up with a changing world. This is what a modern, separately managed account looks like:

- Active management by experienced money management firms
- No fees for transactions*
- One monthly fee based on the value of account**
- A minimum investment of \$25,000



STRATEGIC

Over time, your investment objectives may change. Your platform doesn't have to. Leverage multiple investment themes, including:

- Risk-based global diversification
- Global tactical allocation
- Dynamic and alternative strategies
- Defensive and low-volatility portfolios
- Tax-advantaged strategies
- Active and passive investing

* An investment advisory account carries an annual advisory fee based on assets in the account.

** For a complete description of all fees, costs, and expenses, please refer to Form ADV Part 2A Appendix 1



73%

of Gen Xers feel they need to do more for their retirement savings.¹

Where do you stand?

¹ Malito, A. (2019, September 28). "This generation is way behind on saving for retirement. Here's how they can catch up." Retrieved from <https://www.marketwatch.com/story/generation-x-stop-slacking-you-need-to-catch-up-on-saving-for-retirement-2019-09-23>.



Invest in a better future, today.

 **Visit:** TFAconnect.com

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Investing in securities involves risks, including the possible loss of principal. Diversification does not guarantee a return or protect an investor from potential losses, including the possible loss of principal. Before investing, consider your investment objectives and all applicable fees and expenses. There are additional factors that may affect the overall return. For a complete description of all fees, costs and expenses, please refer to Form ADV Part 2A Appendix 1.

Neither Transamerica nor its agents or representatives may provide tax or legal advice. Anyone to whom this material is promoted, marketed, or recommended should consult with and rely on their own independent tax and legal advisors regarding their particular situation and the concepts presented herein.

Transamerica® ONE accounts are investment advisory accounts. 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.

The custodian for Transamerica ONE accounts is FOLIOfn Investments, Inc., a 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.

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