

Transamerica Wealth Management StrategiesSM Program Money Managers

- 1 Platform
- 1 Statement
- Low Minimum Account Size
- Multiple Model Managers



Flexible Plan Investments, Ltd.
Your partner in active wealth management



AEGON USA Investment Management, LLC (AUIM)

AUIM strives to provide discipline, diversification and downside risk management in all market cycles using a quantitatively driven, dynamic investment process. The strategies are tactically rebalanced on a weekly basis utilizing leading economic indicators and fundamental market analysis and offer multiple solutions that focus on income, growth and capital preservation. AUIM's tactical strategies are available on other investment platforms.

F-Squared Investments

F-Squared has redefined how investment solutions can be reliably delivered to investors through quality returns coupled with downside risk management. F-Squared is not benchmark-centric, as downside risk management requires an ability to de-couple from passive benchmarks as markets weaken. The firm targets relative returns in bull markets and focuses on the risk of loss in bear markets, and seeks to deliver consistently and repeatedly.

Flexible Plan Investments, Ltd. (FPI)

Since 1981, Flexible Plan Investments has been at the forefront of Dynamic Risk-Managed Investing. On the Transamerica Wealth Management Strategies platform they provide a complete, strategically diversified portfolio solution with their core suitability-based Market Leaders' portfolios, plus three Select Strategy offerings – Global, Global Maturities, and Alternatives. Designed to work in tandem, their goal is lower portfolio drawdown, a smoother equity curve and improved returns.

Fund Architects, LLC

Fund Architects' portfolios are known for their global nature, dynamic management, and independent use of asset classes and strategies including alternatives. The firm's models have the flexibility to become more defensive or aggressive based on the investment team's assessment of economic cycles and financial market conditions. Fund Architects strives to provide strong, risk-adjusted returns and uses its sell discipline to reduce volatility in down markets and has the ability to go to 100% cash. The firm's asset allocation services are used on other investment platforms.

Hanlon Investment Management

Hanlon utilizes a formula-driven, systematic method, employing quantitative analysis and the latest technologies to determine when portfolios should be fully invested in the proper asset allocation and when they should be conservatively invested in money market funds. Hanlon's professional money management services are available

in brokerage accounts at major custodians and designated Retirement Platforms. Hanlon offers a broad range of portfolio allocations to accommodate the risk tolerance, investment objectives, and time horizon for nearly all investor types.

Pinnacle Advisory Group, Inc.

Pinnacle portfolios attempt to deliver systematic returns consistent with the broad market while taking considerably less risk, and by doing so they offer investors a reasonable approach to risk management. Analysts use a "go anywhere" approach to find diverse and non-correlated investments allowing them to stay globally-diversified at all times. Pinnacle believes that such diversification coupled with a sustainable, value oriented investment process can provide consistent returns investors rely on in a core holding.

Summit Global Investments (SGI)

SGI's Low Volatility strategies are a more conservative, consistent and capital preserving approach than cap-weighted benchmark-sensitive investment strategies, offering a unique investment approach utilizing individual equities. By employing proprietary quantitative and managed risk overlays focused on managing the entire risk of a portfolio, SGI seeks superior risk return trade-offs, mitigating and minimizing downside risk while still participating in the upside potential equities have offered historically.

Transamerica Asset Management

For more than 25 years, Transamerica Asset Management, Inc. (TAM) has provided investment solutions for institutional and retail clients. TAM is anchored by a team of dedicated investment analysts focused on identifying superior active managers. We combine this expertise with market and economic research to construct model portfolios that seek to improve returns through both tactical allocation and active management. We believe these models will be able to help protect capital in down markets, maintain participation in up markets and outperform over multiple market cycles. TAM's Dual Alpha strategies are available as managed accounts.

Transamerica I-Series®

Transamerica Financial Advisors, Inc. is the sponsor of the Transamerica I-Series® Program and manages strategic, alternative, and tactical asset allocation model portfolios. I-Series strategic portfolios are based on globally diversified asset allocation models that are rebalanced on a quarterly basis. These portfolios can be used as a core holding in a client's account. Transamerica I-Series portfolios are generally constructed using low-cost, tax efficient, exchange-traded funds (ETFs).

The underlying securities of the portfolios are subject to market risk and an investor may lose principal.