

MY FINANCIAL JOURNEY



An exciting financial fitness platform is available in your Ivy Tech Retirement Plan! Brought to you at no cost by Transamerica and Goldman Sachs Ayco, you can take advantage of more than 125 combined years of financial planning expertise.

This easy-to-use platform guides you through essential steps as you prepare for the future. You'll complete personalized tasks around key financial topics, including:

- RETIREMENT PLANNING
- ESTATE PLANNING
- INSURANCE
- INVESTING
- TAX PLANNING
- BUDGETING
- COMPENSATION & BENEFITS

SET SAIL TOWARD A BRIGHTER FUTURE

Scan the QR code to start



1. Go to transamerica.com/portal/ivyretirement
2. Log in or create an account
3. On the **Financial Overview** page, click **LEARN MORE** in the "How's your financial wellness?" banner
4. Take your financial wellness assessment to get your score
5. Dive into your personalized checklist to improve your score

DON'T WADE INTO UNKNOWN WATERS ALONE

Transamerica financial professionals can hop on board at any time to help complete tasks, review your retirement account, or discuss any financial goals you're working toward!



NEED HELP?

Call us today at
800-258-4339

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