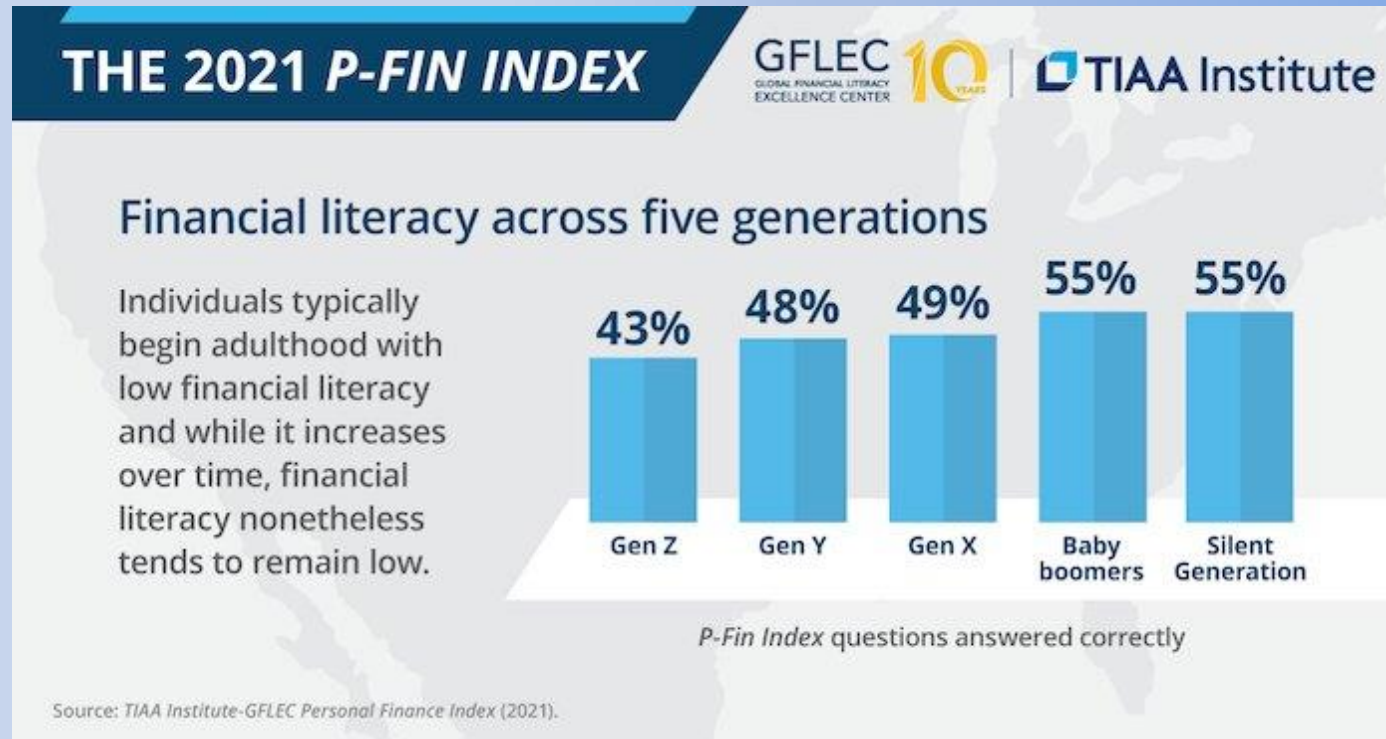


Financial Freedom

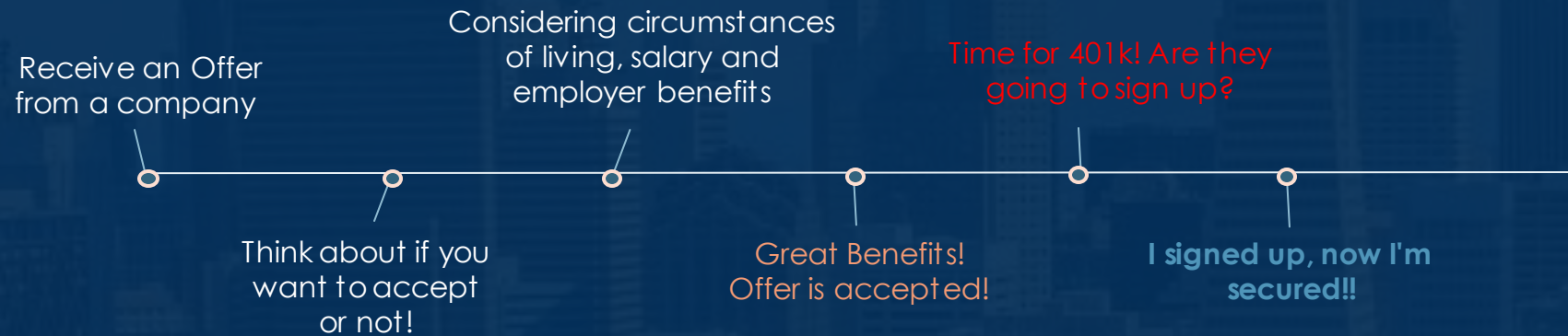
A Presentation by: Henri Bauby, Madeline Brannigan,
Ragavi Chander, and David Molfese



Low Financial Literacy Benefits a "Set It & Forget It" Model



The TransAmerica Dream Journey



The TransAmerica Dream Journey



Let them
Build
their
Lifestyle

BUILD YOUR LIFESTYLE

CRAFT YOUR DREAM FUTURE AND GET
YOUR INVESTMENT QUOTE IMMEDIATELY!

LETS BUILD



Let them be in
control! Choose to
curate the future
they want to see and
get them the
information they
need with clarity
instantly!

BUILD YOUR LIFESTYLE

WHAT IS YOUR IDEAL LIVING LOCATION?



TRANSAMERICA

BUILD YOUR LIFESTYLE

WHAT KIND OF VEHICLE DO YOU WANT TO DRIVE?



TRANSAMERICA

BUILD YOUR LIFESTYLE

HOW MUCH IS YOUR EXPECTED HOUSEHOLD INCOME?

41-60K

61-80K

81K-100K

101K-120K

121K-145K

TRANSAMERICA

BUILD YOUR LIFESTYLE

WHEN DO YOU WANT TO RETIRE?

70 YRS

WHY ARE WE ASKING THIS?
Let's help you figure out how much you should invest based on when you are ready to retire

TRANSAMERICA

TRANSAMERICA®

CALCULATING...

LET'S SEE WHAT YOU SHOULD INVEST

RAGAVIS INVESTMENT PLAN SUMMARY

Invest \$20 more and earn \$9600 more by retirement

\$155 PER MONTH

This is **5%** of your Annual Salary

Invest this amount monthly for the next **40 years** and see **\$74,400** when you are ready to retire

With an employer matches to this price, you can make **\$148,800**

People your age are investing **\$206** monthly on average

Helpful Tips and Tricks to Invest Smartly

Tip #1: Saving sooner creates higher value per dollar for your investments

Tip #2 (Insert Tip)

Learn More Tips

Invest Now

[explore your plan more](#)

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An engineered investment
amount based on the
lifestyle they have
curated

Pop up (nudge) that
encourages you to
invest more to see
more \$\$

The breakdown of
how much they can
see if they invest right
now

A couple Tips and
Tricks to encourage
learning. Starting
small and growing
from there!

Social Proof! How do
they stand amongst
their peers

Auto selected
option to Invest
Now. Reducing the
friction

Option to get more details

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**Higher Contribution
Limits**



UBTI Exempt



**Tax-Free Growth &
Withdrawals**



**Multiple Investment
Options**

Roth Solo 401k Plan

A retirement plan that combines the benefits of a Solo 401k plan and a Roth IRA. Contributions are made with after-tax dollars and if its terms & conditions are satisfied, you will receive tax-free withdrawals.

- Contribute up to \$24,000 in 2016
- Tax-free growth of assets & tax-free withdrawals
- Eliminate custodial consent with a self-directed Roth Solo 401k plan

4 Bonus Features of Roth Solo 401k Plan

1. Checkbook Control: Complete discretion over the investment of your retirement funds; no custodial consent
2. Participant Loan: Borrow up to \$50,000 or 50% of your account balance for any use.
3. Alternative Investments: Real estate, tax liens, tax deeds, precious metals, mortgage notes
4. UBTI Exempt: Purchase debt-financed property with no UBTI tax implications

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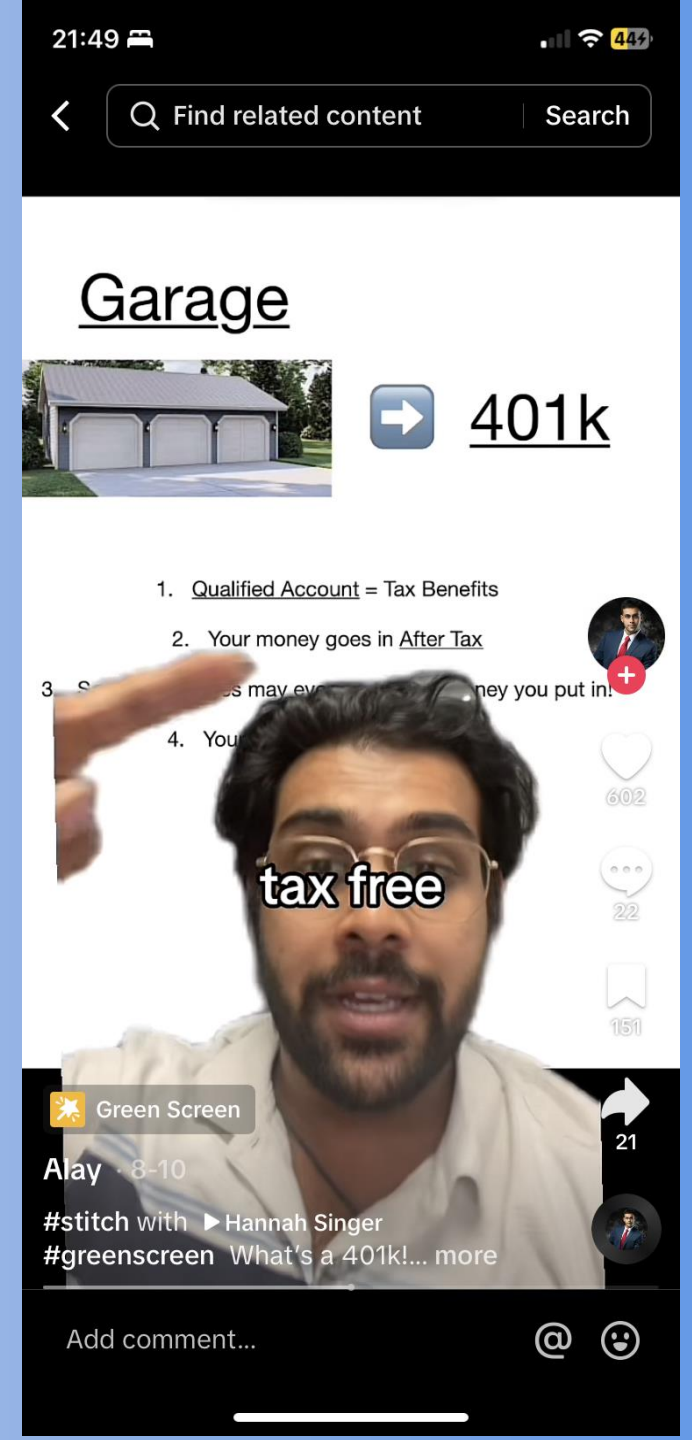
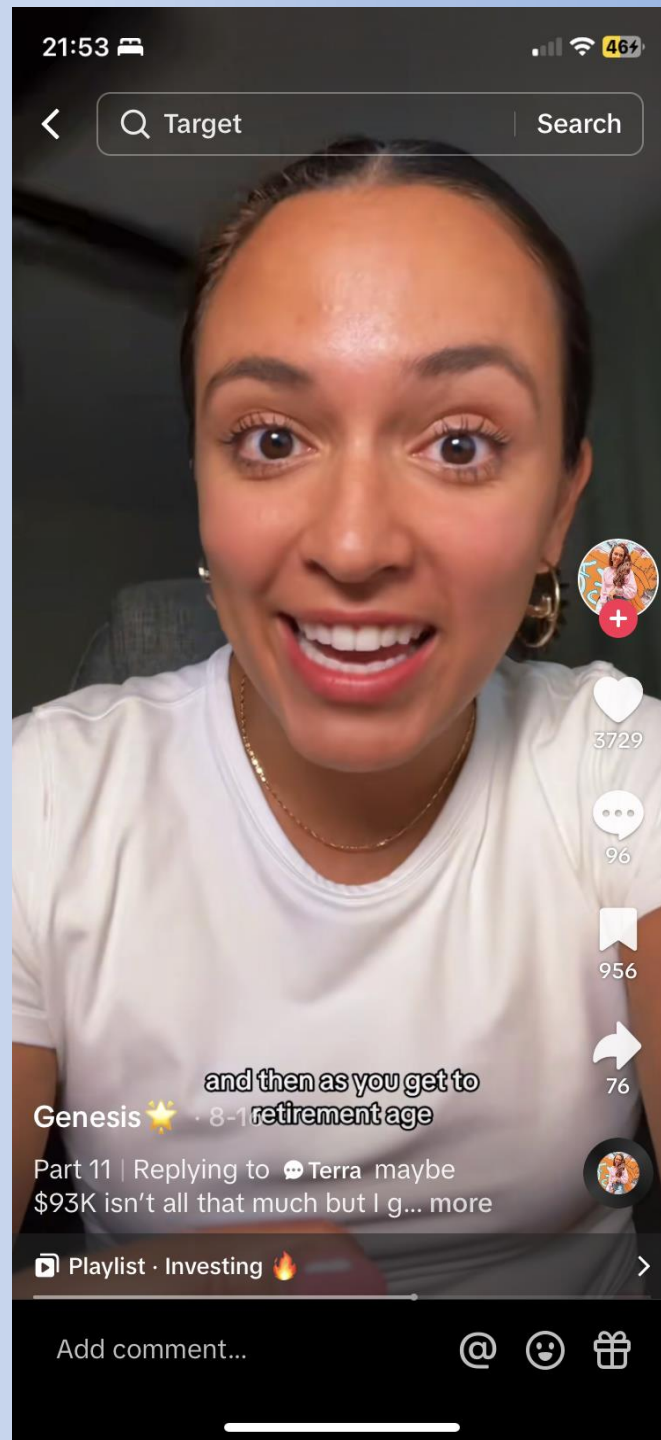
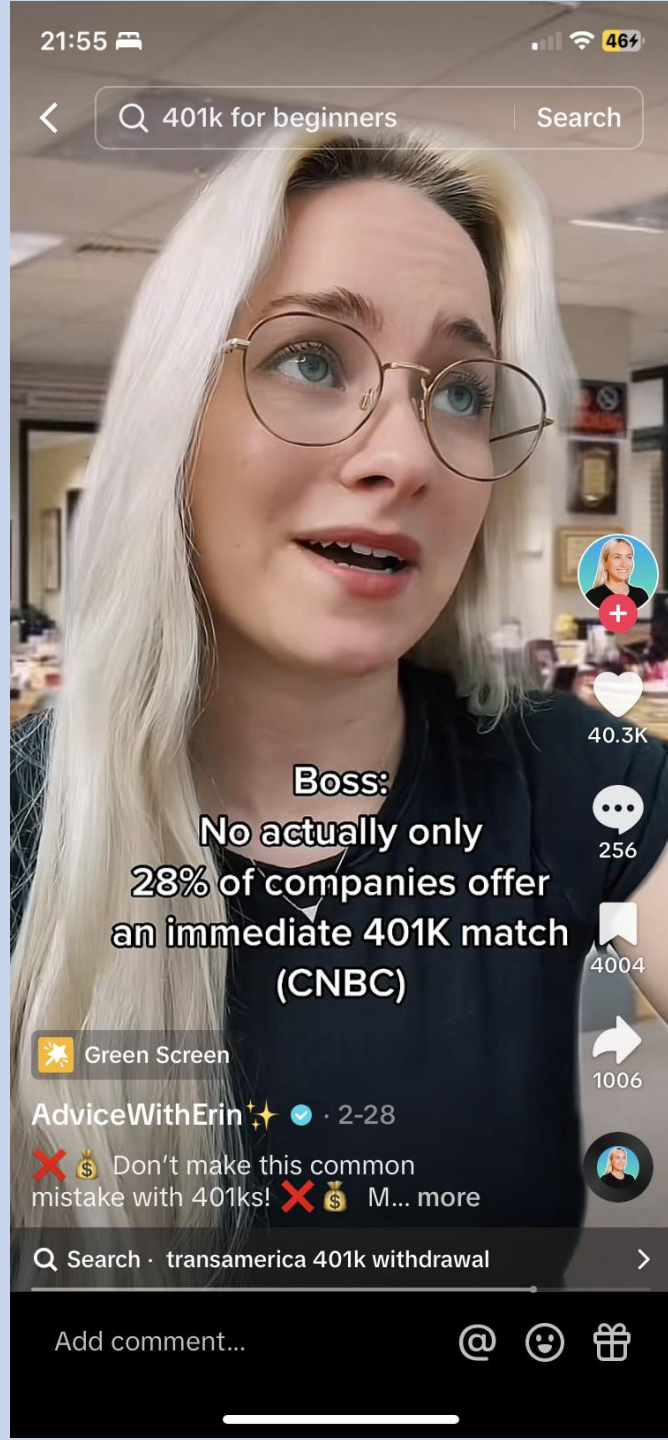
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401k Plan





Simplicity Builds Wealth

Start Small Today To Build a Healthier & Wealthier Tomorrow

