



We are a different
kind of company

PLAN | INVEST | PROTECT

VOYA
FINANCIAL

Built for retirement



6.1 Million
participants

\$520 Billion

In total assets under management
and administration

As of 09/30/2020

More than

51,000

Plan sponsor clients

As of 09/30/2020

1 Digital Solutions – data as of 03/31/2020
2 Voya internal data, as of 12/31/19

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Innovation with a purpose

myOrangeMoney®



4.3 million+

Participants have viewed
myOrangeMoney® since its
2014 launch¹

Top rated

plan participant
web experience

for last 9 years

2011 – 2020

In 2019 alone, myOrangeMoney®
users that took action are
collectively on track to save

\$150M more

for retirement each year²

Unique culture

ETHISPHERE®
WORLD'S MOST
ETHICAL
COMPANIES®
2014-2021



VOYA | Cares®



FORTUNE
WORLD'S MOST
ADMIRED
COMPANIES 2020



Pensions & Investments ★★ 2020 ★★
BEST PLACES TO WORK
IN MONEY MANAGEMENT
MULTIYEAR WINNER
2015 ★ 2016 ★ 2017 ★ 2018 ★ 2019

VOYA FINANCIAL

Voya Financial's Commitment to the 403(b) Market

Commitment to
403(b) plans

20,082

Plans*

52 Years

Experience

\$54.9B

In total 403(b) Assets under
management*

27 Years

Client Tenure

*As of 12/31/20

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Experience with
Similar plans



SMITH COLLEGE

MOUNT HOLYOKE

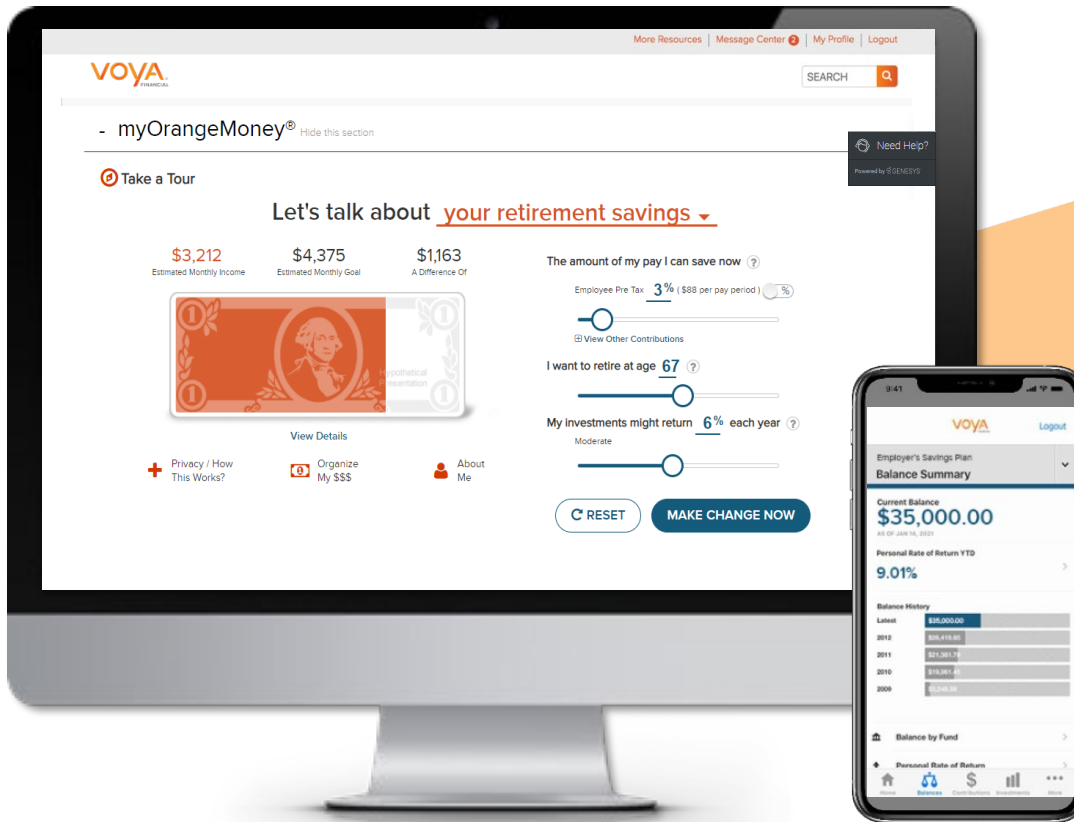
Rollins
EST. 1885

CURRY
COLLEGE

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Innovative Technology

Shifting the mindset from accumulation to income

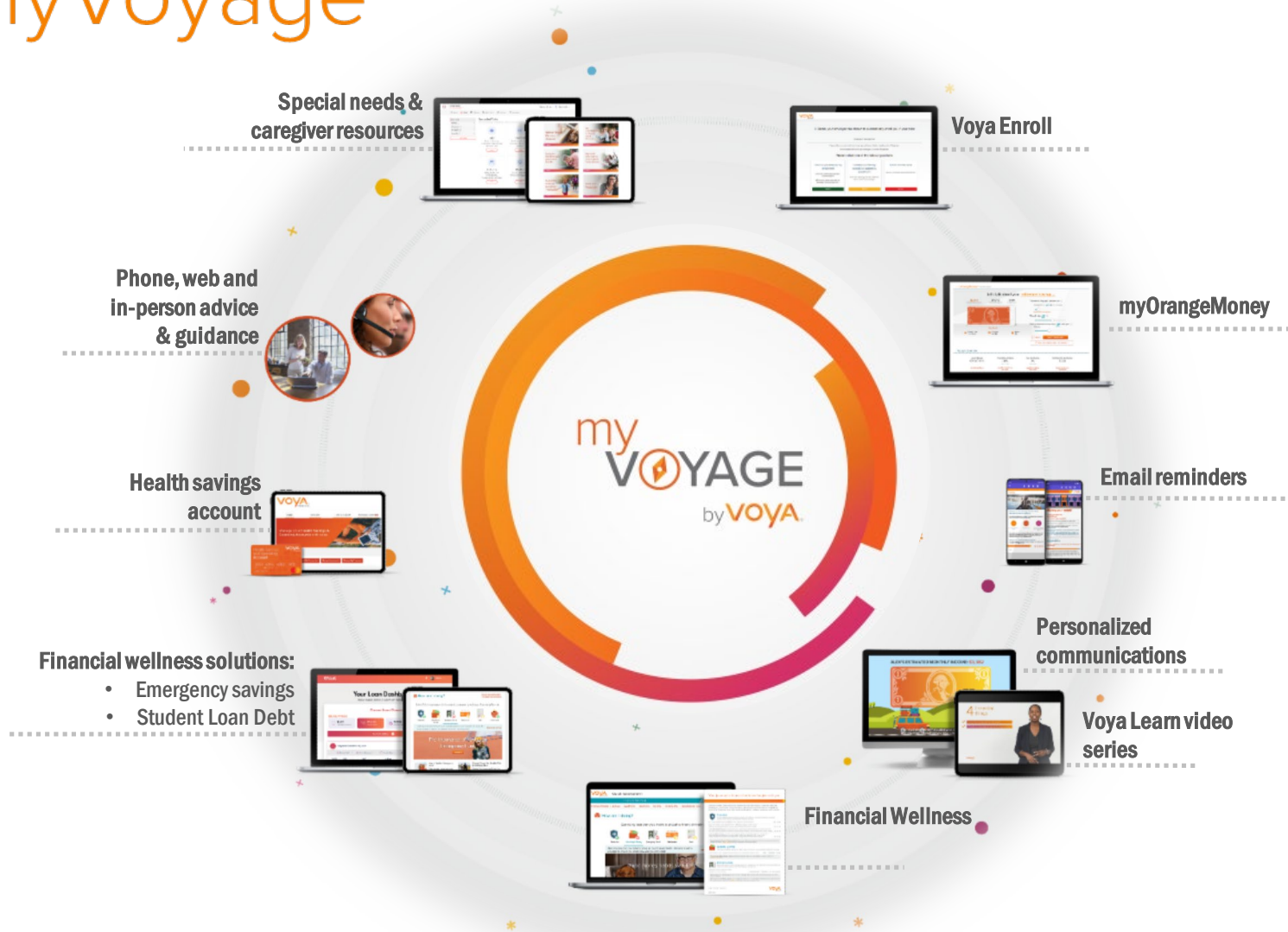


* Recipient of DALBAR's 2020 Communications Seal for the participant website and mobile app, representing excellence in financial services communications

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myVoyage



Vault is a separate entity and not a corporate affiliate of Voya Financial. Voya clients receive discounted pricing on any Vault product. Vault pays Voya Retirement Insurance and Annuity Company an ongoing quarterly marketing fee for referring plan sponsors that elect Vault's student loan debt services. Voya Financial and Millennium Trust are separate, unrelated entities and are not responsible for one another's products or services. Millennium Trust is solely responsible for the offering of the emergency savings solution and all services provided in support thereof. The emergency savings solution is offered outside of the employer's retirement plan. Voya Retirement Insurance and Annuity Company receives a referral fee as a result of the use of the emergency savings solution by its and its affiliates' plan sponsor).

Account Consolidation Team (ACT)

The ACT group has successfully transferred over **110,000 participant accounts** totaling more than **\$5.23 billion in assets**¹.



Oxander Caballero
ACT Consolidation Specialist

In process

- Employee Contacts ACT Member

Awaiting paperwork

- Overview Provided/Conference Call with Previous Provider
- Forms Obtained
- ACT Completes Forms/Acquires Signatures

Awaiting Funding

- Paperwork Submitted to Previous Provider
- Weekly Follow-Up

Fully Funded

- Notification of Successful Transfer

¹Salesforce Reports, September 2020

Account Consolidation Team (ACT)

Simplify your financial life

Learn about your options to help simplify your retirement planning.



We get it.

If you're like many people, you've had more than one job and saved in more than one workplace retirement plan. Your money may still be with former employers or you may have an individual retirement account – or both. Managing multiple retirement accounts can be a real challenge – it eats up time, makes it harder to gauge your progress and may even be costing you more in fees than you realize.

Consolidating your retirement savings into a single account is one of your options that could help simplify your financial life. Voya's[®] here to educate you on all your options. Our team of professionals is here to support you and help you on achieving a simpler financial life today and a successful retirement tomorrow.

Learn about your options today to help simplify.

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Voya Account Consolidation Team

Consolidating

Is consolidating right for you?

- ✓ Stay on top of your finances
- ✓ Organize statements and paperwork
- ✓ Track how your investments are performing
- ✓ Keep your savings and investing strategy aligned with your long-term goals



The Voya Account Consolidation Team can help:

- Explain your options
- Guide you through the consolidation process
- Assist with collecting and completing the paperwork



Give us a call today **1-866-865-2660**

Or you may send an email to today's meeting presenter:

First Name Last Name
Email Address

Please provide the information noted below in your email, and we will have a Voya Account Consolidation Representative contact you.

- Name
- Cell or Home Phone
- Email Address
- Employer Name
- Best time to call

Presenter Name is a registered representative of and offers securities through Voya Financial Advisors, Inc. (member SIPC)



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We are excited about our new partnership!

