

**2022**

# Fact Sheet

## What we do

TruStage™ is a financially strong insurance, investment and technology provider, built on the philosophy of people helping people. We believe a brighter financial future should be accessible to everyone, and our products and solutions help people confidently make financial decisions that work for them at every stage of life. With a culture rooted and focused on creating a more equitable society and financial system, we are deeply committed to giving back to our communities to improve the lives of those we serve.

## We make available the following solutions:

### Insurance

- Consumer Insurance
- Lending Protection
- Final Arrangements
- Business Protection

### Investments

- Annuities
- Wealth Management Solutions
- Workplace Solutions

### Technology

- E-commerce Enablement
- Compliance Solutions

## Performance in 2022



**Assets\*:**  
\$41.3 billion



**Revenue:**  
\$5.2 billion



**Net Income:**  
\$343 million



**Total Surplus:**  
\$2,044 million



**Employees:**  
4,200

For more information, visit [www.trustage.com](http://www.trustage.com).

Insurance | Investments | Technology

\*Liabilities for 2022 at \$39.3 billion

2022

# Impact

## 37M

consumers protected\* by confidently making financial decisions that work for them

## 94%

of credit unions are our customers. We help protect their business and members

## 84

non-profits received funding—including 26 new organizations

## \$30M

contributed to helping the credit union movement—including \$1M pledged to the FinHealth Fund; \$152 million over the last five years

## \$4.9M

pledged to support the communities we serve

## \$2B

in benefits paid

### Contact us

For the latest news about our company, people and industry, visit [www.trustage.com](http://www.trustage.com) or view our [annual report](#).

#### Rachel Strauch-Nelson

Media Manager  
TruStage Ventures, Human Resources,  
Corporate and Legislative Affairs  
[Rachel.StrauchNelson@trustage.com](mailto:Rachel.StrauchNelson@trustage.com)

#### Barclay Pollak

Media and Reputation Strategist  
Credit Union Industry,  
Community and Foundation  
[Barclay.Pollak@trustage.com](mailto:Barclay.Pollak@trustage.com)

#### Kara O'Keeffe

Media and Reputation Strategist  
Annuities, Retirement  
[Kara.okeeffe@trustage.com](mailto:Kara.okeeffe@trustage.com)

### Follow us



### Creating a powerful workplace for progress

We're honored to be recognized by these organizations.



TruStage™ is the marketing name for TruStage Financial Group, Inc. its subsidiaries and affiliates. Securities distributed by CUNA Brokerage Services, Inc., member [FINRA/SIPC](#), a registered broker/dealer, 2000 Heritage Way, Waverly, IA, 50677. Investment and insurance products are not federally insured, may involve investment risk, may lose value and are not obligations of or guaranteed by any depository or lending institution. All guarantees are based on the claims paying ability of the underwriting company. Insurance products are issued by CMFG Life Insurance Company, MEMBERS Life Insurance Company, CUMIS Insurance Society Inc., CUMIS Specialty Insurance Society Inc., American Memorial Life Insurance Company, and Union Security Insurance Company. Please view these important product-specific disclosures: [Consumer Insurance](#) | [Annuities](#) | [Preplanning](#) | [Lending](#) | [Retirement](#) | [Business Protection](#)

Corporate Headquarters 5910 Mineral Point Road, Madison WI 53705 © TruStage. All Rights Reserved. World's Most Ethical Companies and Ethisphere names and marks are registered trademarks of Ethisphere LLC. \*Individual consumer-level policies, certificates, or waivers. Unless otherwise indicated, all data in this report is sourced from TruStage © internal reports, 2022.

CORP-5654738.1-0423-0525