

2024

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 Solutions
- Lending Protection Solutions
- Final Arrangements
- Business Protection Solutions

Investments

- Annuities
- Wealth Management Solutions
- Workplace Solutions

Technology

- Fintech Solutions
- Compliance Solutions

Performance in 2023



Assets*
\$45 billion



Revenue:
\$5.4 billion



Net Income:
\$139 million



Total Surplus:
\$2,868 million



Employee:
4,100

For more information, visit www.trustage.com.

Insurance | Investments | Technology

*Liabilities for 2023 at \$42.1 billion

2024

Impact

39M¹

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

56M

invested in our communities since 1967

\$157M

contributed to helping the credit union movement over the last five years

\$5M

pledged to support the communities we serve

\$2.2B

in benefits paid

Contact us

For the latest news about our company, people and industry, visit 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

Barclay Pollak

Media and Reputation Strategist
Credit Union Industry,
Community and Foundation
Barclay.Pollak@trustage.com

Kara O’Keeffe

Media and Reputation Strategist
Annuities, Retirement
Kara.okeeffe@trustage.com



Creating a powerful workplace for progress

We're honored to be recognized by these organizations.



¹ Individual consumer-level policies, certificates or waivers.

Unless otherwise indicated, all data in this report is sourced from TruStage internal reports, 2023. Visit www.trustage.com/about-us/financial-information to view the audited financial statements.

TruStage™ is the marketing name for TruStage Financial Group, Inc. its subsidiaries and affiliates. Corporate Headquarters 5910 Mineral Point Road, Madison WI 53705