

2025

Fact Sheet

What we do

TruStage™ is a financially strong insurance and financial services provider, built on the philosophy of people helping people, meeting the needs of middle-market consumers and the businesses that serve them since day one. 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 and improving the lives of those we serve today, and tomorrow.

We make available the following solutions:

Insurance

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

Financial Services

- Annuities
- Wealth Management Solutions
- Workplace Solutions
- Fintech Solutions
- Compliance Solutions

Performance in 2024



Assets*
\$37 billion



Revenue:
\$5.6 billion



Net Income:
\$214 million

For more information, visit www.trustage.com.

Insurance | Financial Services

*Liabilities for 2024 at \$47.6 million

2024

Strength in numbers

39M¹

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

93%

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

59.9M

invested in our communities since 1967

\$159M

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

3.6M

customer interactions

\$2.5B

in benefits paid

Contact us

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

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Follow us



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, 2024. Visit www.trustage.com/about-us/financial-information to view the audited financial statements.

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America's Best Insurance Companies 2024 scores were based on the responses of 15k consumers in categories: overall recommendation, satisfaction, loyalty, advice, customer service, price/performance, transparency, digital services and damage/benefit service. This award is based on an independent survey of 3,200+ companies. TruStage's Permanent Life Product, underwritten by CMFG Life Insurance Company ranked #9 in the Permanent Life Category.

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