Service Overview

Demonstrate Your Value to Clients

Mutual of Omaha

You understand the value you can bring to plan sponsors, but do they?

We developed a Service Overview to help convey your differentiated service offering and document your value to your plan sponsor clients. By using the Service Overview as your discussion guide prior to the new plan installation process and on an annual basis, you can engage your plan sponsor clients, assess their needs and offer recommendations for employee education.

When you have the chance to spend some time with a client, there's generally a lot to discuss. So you want to make the most of the opportunity.

The Service Overview opens the door to an honest, open conversation about plan goals, features and support options.

An Opportunity to Make an Impact

By walking through the Service Overview with your plan sponsors, you'll help them understand how minor changes to design or support could make incremental changes for employees, potentially improving retirement outcomes. It gives you the opportunity to make recommendations about additional services you and others provide that could alleviate stress or frustrations in managing and administering their plan.

And from an employee perspective, it allows you to offer suggestions about retirement education–another way to showcase your value and make the products and services you offer top of mind.

Resources That Make It Easy for You

From educational tools and resources to plan design components, there are a number of ways to service and support your clients and their employees.

Employee Engagement Tools and Resources

- Employee Education Flyers
- Employee Education Presentations
- Employee Website (getretirementright.com)
- Enrollment Book
- Enrollment Forms
- Enrollment Presentation
- Innovative Employee Enrollment Process
- Interactive Voice Response System (IVR)
- Mobile Access
- Online Fund Profiles
- Participant Engagement Specialists
- Retirement Calculators
- Retirement Savings Plan Projection

Plan Design Components

- Automatic Enrollment
- Automatic Escalation
- Employer Match
- Safe Harbor Provision

To learn more about the Service Overview, or the plan design components and educational tools and resources available to you, contact your Mutual of Omaha representative.

For informational purposes only. Should not be construed as legal advice. You should engage an attorney to evaluate any legal agreement you make with a client and the ERISA requirements related to your relationship with the client.

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