

# Industry Asset Manager Selection

A comprehensive selection process

Mutual of Omaha Retirement Services offers a product fund lineup that consists of institutionally priced investment options with no proprietary asset requirement.

## Product-level Due Diligence

Our Investment Manager Oversight Committee partners with Callan LLC for independent, third-party fund selection, evaluation and monitoring. Together we screen more than 20,000 investment options from over 1,000 managers to present a manageable list of nearly 100 funds from over 35 different investment managers.

## Comprehensive Strategy

This independent third-party analysis includes a qualitative and quantitative approach to manager research and helps offer a diversified menu of investment choices designed for long-term retirement plan investing.

The end result is a comprehensive investment platform covering all major style boxes including:

- Institutionally sourced and priced mutual funds
- Collective investment trusts (CITs)
- Separate accounts
- Low-cost index funds
- Two risk-based asset allocation series: Directions 1-5 and T.Rowe Price Personal Strategies
- Five Qualified Default Investment Alternatives including target date funds and individually managed account options

Below are some of the industry asset managers utilized by Mutual of Omaha Retirement Services. We provide cost-effective retirement solutions to you and your plan sponsors.



Mutual of Omaha

Underwritten by  
United of Omaha Life Insurance Company  
Companion Life Insurance Company  
Mutual of Omaha Affiliates

---

## **Why Mutual of Omaha**

We're invested in your success. We're committed to giving you the products your customers want plus the tools, resources and support you need.

[MutualofOmaha.com](https://MutualofOmaha.com)