United of Omaha Life Insurance Company | Companion Life Insurance Company

MUTUAL OF OMAHA RETIREMENT SERVICES

Service Overview

Demonstrate Your Value to Clients

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

Plan Design Components

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

Education Tools and Resources

- Quarterly Employee Newsletter
- SmartPlan Enterprise by vWise (Interactive Video-Based Educational Tool)
- Retirement Savings Plan Projection
- Retirement Calculators
- Employee Education Flyers
- Enrollment Presentation
- Enrollment Book
- Enrollment Forms
- Education Presentations
- Interactive Voice Response System (IVR)
- Employee Website (getretirementright.com)
- Mobile Access
- Online Fund Profiles

To learn more about the Service Overview, or the plan design components and educations 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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Investment options are offered through a group variable annuity contract (Forms 902-GAQC-09, 903-GAQC-14, 903-GAQC-14 FL, 903-GAQC-14 MN, 903-GAQC-14 OR, 903-GAQC-14 TX, or state equivalent) underwritten by United of Omaha Life Insurance Company for contracts issued in all states except New York. United of Omaha Life Insurance Company, Omaha, NE 68175 is licensed nationwide except in New York. Companion Life Insurance Company, Hauppauge, NY 11788 is licensed in New York and underwrites the group variable annuity (Form 900-GAQC-07(NY)). Each company accepts full responsibility for each of their respective contractual obligations under the contract but does not guarantee any contributions or investment returns except as to the Guaranteed Account and the Lifetime Guaranteed Income Account as provided under the contract. Specific features of the Lifetime Guaranteed Income Account vary by state. Restrictions apply. The Lifetime Guaranteed Income Account is not available in Nevada or New York. Neither United of Omaha Life Insurance Company, Companion Life Insurance Company, nor their representatives or affiliates offers investment advice in connection with the contract.

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