

# > Client Satisfaction Survey Results

“BEST-IN-CLASS” SERVICE AFFIRMED BY THIRD-PARTY RESEARCH FIRM, CHATHAM PARTNERS

## 2016 Survey Highlights

### Best-In-Class Client Satisfaction Ratings\*

OVERALL IMPRESSIONS*		PRODUCTS AND SERVICES*	
Category	Rating	Category	Rating
Offers full range of services	95%	Overall satisfaction (all clients)	96%
Helps fulfill fiduciary responsibilities	94%	Processing employee transactions	98%
Easy to do business with	94%	Personnel	97%
Provides high-quality service	93%	Participant services	96%
Would recommend to others	92%	Plan sponsor services	94%

“Mutual of Omaha’s 98% rating for Overall Satisfaction from full-service clients is the highest of all full-service providers in the benchmark.”\*

-Chatham Partners, August 2016



**EXCEEDED** Chatham’s proprietary small market benchmarks in **22** of **23** categories, including the **plan sponsor** – and – **participant services** (which are most closely correlated to overall satisfaction).

### Quality of Service

Have you encountered any problems?

No | 92%

Are you confident in Mutual of Omaha’s ability to resolve problems?

Yes | 98%

\*Based on a rating of five, six or seven on a seven-point scale. These ratings are considered “best-in-class” by Chatham Partners, a market research firm specializing in financial services. Chatham’s proprietary industry benchmark includes 10 major plan providers.

## “ Simplicity

“Mutual of Omaha has always been wonderful to work with. The transfer of our 401(k) plan to them went smoothly and, to this day, everyone you come in contact with is professional and knowledgeable, along with being friendly and helpful.”

*\$1.6MM, Full Service Plan*

“Customer service on the administrative aspect is awesome. I was impressed from the very beginning as we were guided through the process of developing/modifying our plan. Everything was explained in layman’s terms.”

*\$0.9 MM, Full Service Plan*

“This was my first year with Mutual of Omaha, and our Client Relationship Manager was very helpful with my millions of questions. He was very patient with me, also.”

*\$3.8MM, Full Service Plan*

## “ Ease of Doing Business

“Quick response time and ease of administration on a 401(k) plan is so important. Mutual of Omaha does a great job in those areas.”

*\$1.7MM, Full Service Plan*

“Mutual of Omaha has the best group of customer service reps I have ever worked with! A+. They are always friendly and knowledgeable about how to solve my issues.”

*\$1.4MM, Full Service Plan*

“The addition of Admin Advantage was a major improvement. It took a lot of responsibility off the plan administrator.”

*\$2.4MM, Full Service Plan*

“Our company has expanded our needs, and Mutual of Omaha personnel have been very instrumental in making sure everything has been handled timely and correctly.”

*\$1.5MM, Full Service Plan*

## “ Peace of Mind

“Our Client Relationship Manager is top notch! She is amazing and is my ‘go-to’ with any questions. She is always very knowledgeable and gets back to me in a very timely manner. I would be proud to have her on any team that I am on.”

*\$1.4MM, Full Service Plan*

“I have enjoyed the relationship that I have with our Client Relationship Manager. He is always available with information or points me in the right direction, and he does it all with a laugh and smile.”

*\$1.6MM, Full Service Plan*

“Mutual of Omaha personnel are amazing to work with and seem to value the relationship we have.”

*\$6.5MM, Full Service Plan*

Mutual of Omaha commissioned Chatham Partners to conduct a client satisfaction survey to all group variable annuity contract customers of United of Omaha Life Insurance Company and Companion Life Insurance Company. The three month survey, concluded in June 2016, had an overall customer response rate of 28%. Survey results are limited to those expressing an opinion. Chatham Partners is a leading independent market research firm and is not affiliated with Mutual of Omaha or any of its affiliated entities.

Mutual of Omaha Retirement Services is a marketing name for the Retirement Plans Division of Mutual of Omaha Insurance Company.