

> Retirement Solutions

PRODUCT HIGHLIGHTS

There are many factors to consider when choosing the right retirement product provider. And any one of them could make or break the success of your plan. When all eyes are on you to deliver a well-run retirement plan for your company, look to us.

Comprehensive Solutions

Our diversified investment options, personalized customer service and three-tiered approach to fiduciary support help provide a comprehensive solution designed to exceed your expectations. During these uncertain times, we stand ready to meet your retirement plan needs, just as we always have.



FLEXIBLE INVESTMENT OPTIONS

- More than 75 investment options from more than 25 different asset managers
- Risk-based and time-based asset allocation portfolios
- Professionally managed account options
- Qualified Default Investment Alternative (QDIA) options
- Self-directed brokerage account with access to unlimited fund choices
- Lifetime Guaranteed Income Account

FIDUCIARY SUPPORT

- *Product-level* oversight from our Investment Manager Oversight Committee and the consulting services of Callan Associates, Inc.
- *Plan-level* guidance from the individual appointment of investment managers and the Mesirow Financial* fiduciary services program, which appoints Mesirow as a limited scope 3(21) co-fiduciary to the plan or a full-scope 3(38) Investment Manager service

- *Participant-level* confidence from professionally managed account options, including two target date series and two individually managed account options
- 401(k) Admin AdvantageSM provides co-fiduciary administrative services so you don't have to be a qualified plan expert; thus minimizing risk for the plan sponsor

RECORDKEEPING AND PLAN ADMINISTRATION

- Full-service and TPA models available
- Annual plan review and quarterly reporting
- Plan health report
- Retirement readiness projections for participants
- Customized website
- FocIPoint fiduciary document storage
- 401(k) Admin Advantage services

Availability of each feature varies by plan.

*A separate agreement with Mesirow Financial is required.

PERSONAL, FRIENDLY SERVICES

Plan Sponsor Services

- Relationship manager assigned to each plan
- Installation and conversion support
- 24-hour plan access (online and telephone)
- Participant communications resources
- Regular industry and legislative updates
- Monthly investment performance reports

Participant Services

- 24-hour account access (online and telephone)
- Experienced and knowledgeable customer service reps
- Online and printed statements

- Online loan modeling and loan requests
- Quarterly newsletters
- Online planning tools and calculators
- Opportunity for continuous learning through SmartPlan EnterpriseSM

Enrollment Support

- Customized enrollment materials
- Online enrollment
- Instructor-led enrollment meetings
- Electronic presentations
- Interactive video-based retirement planning tool

GET RETIREMENT RIGHT[®]

UNITED OF OMAHA LIFE INSURANCE COMPANY

3300 Mutual of Omaha Plaza, Omaha, NE 68175

COMPANION LIFE INSURANCE COMPANY

Hauppauge, NY 11788

(877) 401-SALE (7253)

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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, 3300 Mutual of Omaha Plaza, 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.

Group variable annuities are long-term investment vehicles designed to accumulate money on a tax-deferred basis for retirement purposes. Distributions may be subject to ordinary income tax and, if taken prior to age 59½, a 10 percent federal tax penalty may apply. Investing in a group variable annuity involves risk, including possible loss of principal.

Prior to selecting investment options for the plan, plan sponsors should carefully consider the investment objectives, risks, fees and expenses of each option carefully. For this and other important information, plan sponsors should review the fee disclosure document or the plan sponsor website. Read this information carefully.

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