

## > Retirement Solutions

### PRODUCT HIGHLIGHTS

There are many factors to consider when choosing the right retirement 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.



#### 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 Advantage<sup>SM</sup> provides co-fiduciary administrative services so you don't have to be a qualified plan expert; thus minimizing risk for the plan sponsor

#### FLEXIBLE INVESTMENT OPTIONS

- More than 70 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

#### 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
- Ability for plan sponsor to outsource administrative tasks

*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 summary and detailed investment analytics
- Quarterly “Insights” newsletter
- Participant notice mailings and transaction approvals\*\*

### Participant Services

- 24-hour account access (online and telephone)
- Experienced and knowledgeable customer service reps
- Online and printed statements
- Mobile access to account information
- Online loan modeling and loan requests
- Online planning tools and calculators

### Enrollment Support

- Customized enrollment materials
- Online enrollment
- Professionally managed enrollment meetings
- Enrollment videos
- Meeting announcement materials
- Personalized advisor through Morningstar® Retirement Manager<sup>SM</sup>

***For more information about our comprehensive retirement plan solutions, contact your Mutual of Omaha representative.***

**GET RETIREMENT RIGHT®**

\*\*Offered through 401(k) Admin Advantage, an ERISA 3(16) Fiduciary Service

## **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)

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. All guarantees are based on the claims paying ability and financial strength of the underwriting company. 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.

***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.***

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

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