



Plan Health Assessment Summary

[PLAN NAME]

[DATE]

[PRESENTED BY: ADVISOR(S) NAMES]

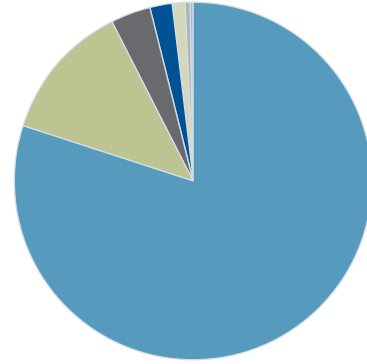


Plan Health Assessment Summary

[Plan Name] [Effective Date]

Projected Income Replacement Ratios

Many financial professionals suggest that [80%] of an individual's current income – adjusted for inflation, including Social Security – might be needed to maintain the same lifestyle in retirement. The chart below illustrates the projected income replacement ratios for your eligible employees* according to that benchmark.



Goal	# of Eligible Employees	% of Total Eligible Employees
> 80%		
60-80%		
40-60%		
20-40%		
< 20%		

- Meets or exceeds 80% of income replacement
- 60-80% of income replacement
- 40-60% of income replacement
- 20-40% of income replacement
- 0-20% of income replacement

Assumes retirement age of [65] and long-term investment return of [7%]. Assumes [80%] replacement of current income, adjusted for inflation at retirement. Assumes an annual inflation adjustment of [3%]. Assumes 20 years in retirement.

Participation and Deferral Information

Total Eligible Employees	# of Eligible Employees		% of Eligible Employees		Average Deferral Rate
	Contributing	Not Contributing	Contributing	Not Contributing	

Employer Match Information

	# of Eligible Employees	% of Eligible Employees
Not taking full advantage of match		
Contributing at or above full match		

Income Replacement by Age Group

Age Group	# of Eligible Employees	# on Track for 80% of Income Replacement	% on Track for 80% of Income Replacement
18-25			
26-35			
36-45			
46-55			
56-65			
66 or older			

* An employee is eligible to participate in his or her Employer's retirement plan when he or she meets certain conditions stated in the plan document.

Industry Report Card

In today's competitive employment market, attracting, retaining and rewarding talent often comes down to the benefits you offer. These days, your retirement plan could make the difference between top talent choosing you or your competitor.

This industry report card is designed to provide you with a snapshot of how your plan compares to other employers your size. And it highlights industry benchmarks that can help you strengthen your plan and stay competitive.

The report card also gives you recommendations on the education tools available to assist your employees in learning more about the features of your plan and how it can help them get retirement right.

Plan Benchmarks*

Participation	[xx%]	[xx%]
Deferral Rate	[xx%]	[xx%]

Your Average (in blue) - Industry Average (in black)

Plan Design Utilization

	Your Plan	Industry Benchmark
Auto Enroll	Yes	%
Auto Escalation	No	%
Match (Ave %*)	Yes (40%)	Will be match formula
QDIA	Yes/No	%**

Ideas to Help Improve Retirement Outcomes

- Participant Retirement Readiness Report
- Online Education and Tools
- [Personal Investment Planning] only to show for those plans where the advisor is willing
- Auto Enrollment New
- Auto Enrollment Existing
- Auto Escalation

*Industry benchmarks obtained from 56th Annual PSCA Survey of Profit Sharing and 401(k) Plans. See back for important disclaimers.

**QDIA benchmark represents all industries and all plan sizes.

To learn more about the education tools available and plan design features that can help improve your plan's health, please contact [contact name] at [phone] or [email].

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[ADVISOR CONTACT INFORMATION]

[RM CONTACT INFORMATION]

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 of the issuing 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 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.

The Plan Sponsor Council of America's 56th Annual Survey of Profit Sharing and 401(k) Plans reports on the 2012 plan-year experience of 840 plans.

Social Security benefits are estimated using calculations modeled after the Social Security Administration's Quick Calculator and may differ from actual benefits. For the most accurate estimate of Social Security benefits, visit ssa.gov.

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