



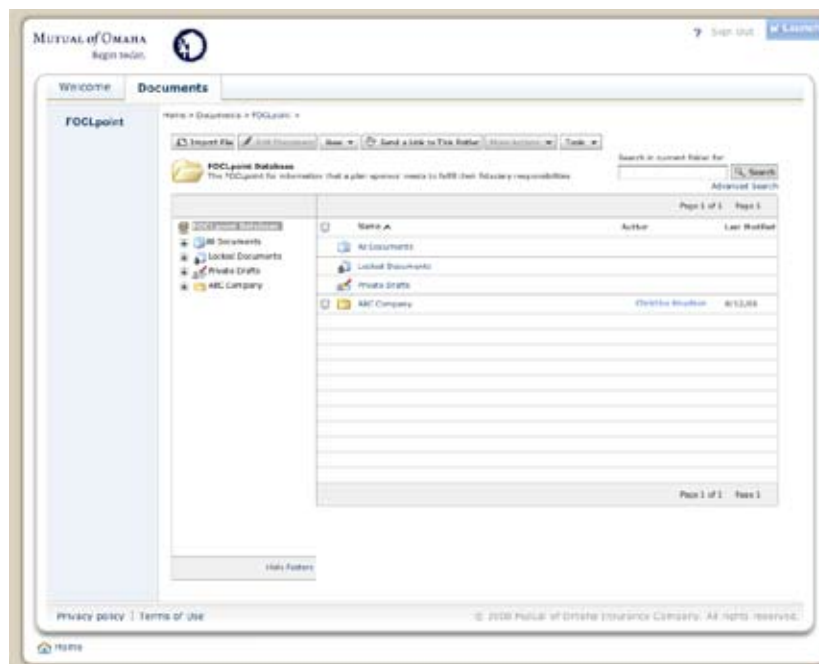
FOCLPOINT

Fiduciary Online Communication Library

Ongoing legislative issues and rulings often result in even more fiduciary responsibility for plan sponsors. The required paperwork alone can leave plan sponsors scrambling to find what they need to ensure plan compliance. Mutual of Omaha Retirement Services can help today's busy plan sponsors get their fiduciary documents organized through FOCLpoint, an online communication library.

SECURE, CENTRAL DATABASE

FOCLpoint is an innovative, online database designed to put plan-specific fiduciary documents in one secure location. When plan sponsors choose to use FOCLpoint for their retirement plans, key documents are populated in the database. Then, as additional paperwork becomes available, plan sponsors can add their own customized documents to meet their specific needs.



ORGANIZE FIDUCIARY DOCUMENTS

Below are the folders within FOCLpoint. Mutual of Omaha will upload the contracts folder, and the plan sponsor may add new or updated documents as needed. The Fiduciary Compliance, 5500 and Audit Assistance, and My Documents folders are provided to plan sponsors to organize and store their documents. Examples include:

CONTRACTS

- FAP
- Contract
- Contract Riders
- Adoption Agreement
- Plan Document
- Summary Plan Description
- Recordkeeping Services Agreement
- Mesirow Contract
- Stadion Agreement
- Morningstar Contract
- MG Trust Custodial Agreement

FIDUCIARY COMPLIANCE

- Callan Investment Report (Executive Summary)
- Mesirow Report

5500 AND AUDIT ASSISTANCE

- 5500 Information (DFE Certification)
- GIC Audit Information

MY DOCUMENTS

- Board Minutes
- Board Resolution
- Investment Policy Statement

REFERENCE MATERIALS

- FOCLpoint User's Guide

VALUE-ADDED SERVICE FROM MUTUAL OF OMAHA

Mutual of Omaha provides FOCLpoint as a way to store the information a plan sponsor needs to fulfill their fiduciary responsibilities.

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UNITED OF OMAHA LIFE INSURANCE COMPANY

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 or 902-GAQC-09(OR) or 901-GAQC-07 or 901-GAQC-07(OR)) underwritten by United of Omaha Life Insurance Company for contracts issued in all states except New York. United of Omaha Life Insurance Company is not licensed in New York. In New York, Companion Life Insurance Company, Hauppauge, NY 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. Neither United of Omaha, Companion Life Insurance, nor their representatives or affiliates offers investment advice in connection with the contract.

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