



## TPA

## Recognition Awards Program

As a Third Party Administrator (TPA), your services are a key component of a successful Mutual of Omaha retirement plan. We understand that you take considerable steps to develop and maintain strong relationships with plan sponsors. To recognize the role you play on our team, we created an awards program to help you offset some of your operational expenses.

### AWARDS PROGRAM

- Eligible TPA will receive 0.10% on first year deposits and 0.05% on assets under management
- Award payment is based on all transfer, rollover and ongoing deposits, and begins the month following receipt of assets
- Deposit-based award is paid from month one through month twelve and asset-based award is paid from month one indefinitely
- Incentive award is paid monthly
- No annual case or asset requirements to continue to receive award
- Designed to help you offset your fees and make takeover costs competitive

### REQUIREMENTS

- Must be a Mutual of Omaha approved TPA with an executed TPA service agreement
- Only sales of United of Omaha and Companion of New York Defined Contribution and Investment-only Defined Benefit products will qualify
- Only assets placed in United of Omaha and Companion of New York contracts will qualify (i.e., brokerage window assets, outside funds and company stock are not eligible)

### MISCELLANEOUS

- You may opt out of the program at any time for individual cases or your entire block of business with Mutual of Omaha
- No modification can be made to the TPA Incentive Award without TPA approval
- Confidential and proprietary information, as defined in your TPA agreement, does not include information regarding any recognition award
- You are responsible for any compensation disclosure obligations you may have governing relationships with clients

For more information about this program, contact our TPA team at (402) 390-1390 or e-mail [RPD.TPA@mutualofomaha.com](mailto:RPD.TPA@mutualofomaha.com). For more information about our products or investments, visit [GetRetirementRight.com](http://GetRetirementRight.com).

*Mutual of Omaha may change, limit or cancel the award program at any time.*

# GET RETIREMENT RIGHT<sup>®</sup>

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## MUTUAL OF OMAHA RETIREMENT SERVICES

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*GetRetirementRight.com*



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