



RETIREMENT SOLUTIONS

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

FLEXIBLE INVESTMENT OPTIONS

- More than 70 investment options from more than 30 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

THREE LEVELS OF FIDUCIARY SUPPORT

- *Product-level* oversight from Mutual of Omaha's 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 Stadion and Morningstar® Retirement ManagerSM

Product Highlights

RECORDKEEPING AND PLAN ADMINISTRATION

- Full-service and TPA models available
- Online access to plan data
- Ability to customize client reports
- Wide array of payroll formats
- Contribution and distribution processing
- Quarterly plan reporting
- Participant statements mailed to the participants' homes
- Custodial and trust services
- IRS Form 5500
- 1099-R services

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

Enrollment Support

- Customized enrollment materials
- Online enrollment
- Instructor-led enrollment meetings
- Electronic presentations

Availability of each feature varies by plan.

**A separate agreement with Mesirow Financial is required.*

GET RETIREMENT RIGHT[®]

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 902-GAQC-09(CT) or 901-GAQC-07) underwritten by United of Omaha Life Insurance Company for contracts issued in all states except New York. United of Omaha Life Insurance Company, Omaha, NE 68175 is not licensed in New York. In New York, Companion Life Insurance Company, Hauppauge, NY 11788 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 Life Insurance Company, Companion Life Insurance Company, nor their representatives or affiliates offers investment advice in connection with the contract.

Specific features of the Lifetime Guaranteed Income Account (Rider Forms 651-GAQR-10 or 651-GAQR-10(CT) or 651GAQR-10(OR)) vary by state. Restrictions apply. The Lifetime Guaranteed Income Account is not available in Nevada or New York.

MUTUAL of OMAHA'S
WILD KINGDOM
on Animal Planet

