



CUSTOMER SUPPORT

Three Levels of Personalized Service

Managing a retirement plan is a complex and time-consuming task. And it can take valuable time away from other responsibilities. So in a world where you're constantly asked to do more with less, it's important to get superior support from your retirement plan provider. That's why Mutual of Omaha's team of retirement specialists is committed to providing the personalized support you need, backed by the unwavering service standards you deserve.

1. RELATIONSHIP MANAGERS

Relationship managers get to know the unique details of your plan and provide personalized consultation on ways to manage and enhance your plan. Averaging 15 years of retirement plans experience and supported by a nationwide client services team, your relationship manager stands ready to assist with enrollment, ongoing plan administration and participant education. And as needed, your relationship manager also will work hand-in-hand with your advisor/broker and third-party administrator (TPA).

2. CLIENT SERVICES TEAM

From initial enrollment to ongoing plan operations, specialists from our experienced client services team work one-on-one with you and your financial advisor on a day-to-day basis. The team also assists with all plan administration, compliance and recordkeeping matters, and can be reached Monday through Friday, 8:00 a.m. to 5:00 p.m. CST.

3. ONLINE AND AUTOMATED TELEPHONE SERVICES

In today's fast-paced world, you and your participants need a convenient way to access your plan and account information. Certain administrative functions, reporting capabilities and basic information can be obtained 24 hours a day through our Web site at GetRetirementRight.com or via our interactive voice response (IVR) system. For non-English speaking participants, multi-lingual assistance is available through the IVR.

TEST OUR SERVICES

Go to GetRetirementRight.com and click the appropriate login link to test our plan sponsor and plan participant Web sites.

PLAN SPONSOR ACCOUNT LOGIN

Client Number: 711807

PIN: 166687

PLAN PARTICIPANT ACCOUNT LOGIN

User ID: 888888032M

Password: Moppt123

ZIP Code: 12345

Date of Birth: 01/01/1960

First 3 Digits of SSN: 888

Last 4 Digits of SSN: 8032

PLAN PARTICIPANT INTERACTIVE VOICE RESPONSE (IVR) SYSTEM DEMO

Call (888) 917-7191 and enter the following login information:

User ID: 888888032

PIN: 3524

PLAN ACCESS

(888) 917-7120

Service representatives available Monday - Friday,
7:00 a.m. - 7:00 p.m. CST

GENERAL QUESTIONS

Mutual of Omaha Retirement Services

Mutual of Omaha Plaza

Omaha, NE 68175

retire@mutualofomaha.com

ONGOING COMMUNICATIONS

- *Performance Quarterly* – a quarterly e-newsletter that includes a market overview and specific fund returns for the previous quarter
- *Annual Plan Review* – a comprehensive report including a synopsis of plan statistics and fund performance sent at the end of the plan year
- *Sponsor Insights* – a monthly e-communication that provides important legislative updates, product enhancements and other necessary information needed to manage your plan

GET RETIREMENT RIGHT[®]

MUTUAL OF OMAHA RETIREMENT SERVICES

Mutual of Omaha Plaza

Omaha, NE 68175

(877) 401-SALE (7253)



For informational purposes only. Should not be construed as legal or investment advice, a promise of benefit or guarantee of investment performance.

MUTUAL of OMAHA'S
WILD KINGDOM
on Animal Planet

