



Ready, Aim, Retire.

401k Toolbox[®] Available to All New and Existing Plans

Mutual of Omaha Retirement Services has partnered with PMFM, Inc. to give participants access to individual retirement savings advice through 401k Toolbox[®] Manage It For Me.[®]

[401k Toolbox](#) is an Individually Managed Account (IMA) option that makes investment decisions on behalf of a participant and provides ongoing retirement account management consistent with the participant's retirement goals. As an "active" IMA option, 401k Toolbox will make investment decisions according to changing market conditions.

Added Fiduciary Protection

By using 401k Toolbox as a Qualified Default Investment Alternative (QDIA), plan sponsors can receive the highest level of fiduciary protection available under ERISA. 401k Toolbox's unique account management service provides downside protection and reduced risk exposure as participants near retirement. This means that the investment decision responsibility rests safely with PMFM's team of financial experts.

Listen to the 401k Toolbox [WebEx presentation](#) to learn more.

Note: You don't need a password to view this presentation.

2nd Quarter Mesirow POLICE Report Now Available

As part of its Fiduciary Partnership Program, Mesirow Financial provides plan sponsors with a detailed quarterly analysis of the funds within Mutual of Omaha's retirement product. The POLICE report summarizes current market and economic activity, account performance and fund analysis to help plan sponsors understand and monitor their plan's progress.

Reports include the following information:

- * Explanation of any changes to funds from the previous quarter
- * Market commentary on the previous quarter
- * Performance summaries of all Elite funds
- * Individual fund statistics and select holdings information
- * Outstanding issues on both a qualitative and quantitative basis on any funds on the Elite Lists

Read the 2nd Quarter POLICE Report

[Companion Quarterly Report](#)
[United Quarterly Report](#)

Change to Mutual of Omaha Plan Fund Line Up

Earlier this year, Julius Baer Investment Management LLC became Artio Global Management LLC. The change reflects the creation of a separate U.S. based organization, allowing expanded employee ownership and public offering of shares.

Effective October 13, the Julius Baer International Equity Fund II will be renamed Artio International

Equity Fund II. The investment team and philosophy of the funds will remain the same.

Mutual of Omaha's Investment Options

Mutual of Omaha's retirement plan product includes an array of [world-class investment options](#) and asset allocation portfolios. To help ensure objectivity, they work with leading independent investment consultant Callan Associates, Inc., to help with investment selection, portfolio allocation and ongoing performance monitoring and evaluation.

Choices for a Variety of Investment Styles

Designed specifically for long-term investing, Mutual of Omaha's product offers investment approaches for a variety of styles. Whether participants select the ready-made professional investment portfolios, opt to build their own portfolios or let the experts do it, the investment line up can help them realize their financial and retirement savings goals.

Mutual Directions[®] portfolios can help simplify investment selection by providing easy-to-understand, risk-based performance potential.

Mutual GlidePathSM portfolios are designed to help investors achieve a broadly diversified portfolio that will gradually become more conservative in its allocation as the target retirement date nears. The portfolios continue to be allocated along their investment "glidepaths" for twenty years beyond the target date.



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Retirement Marketing Solutions, Inc. (RMS) is a national wholesaling organization that specializes in retirement products. With seasoned retirement experts located across the U.S., RMS provides sales support, proposal generation, education, enrollment support and ongoing services to independent brokers and advisors. RMS works diligently to develop relationships with select providers to secure quality products and competitive pricing arrangements on behalf of those who sell the products.

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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