

# Retirement Right

## Blueprint<sup>SM</sup>

**Your blueprint to getting  
retirement right!**

**Driven by a passion to help the millions of Americans who either have no access to a retirement plan or are projected to fall short in achieving their retirement goals, Mutual of Omaha Retirement Services created Retirement Right Blueprint<sup>SM</sup>, a new open architecture retirement plan solution.**

**Retirement Right Blueprint<sup>SM</sup>** is more than a product, it's a customer experience built to simplify the process of designing, installing and administering the right retirement plan for each customer. The product leverages the latest technology capabilities alongside Mutual of Omaha's 45+ years of passion for helping our customers get retirement right. This unique combination takes the time, complexity and confusion out of retirement planning.

**Accessibility: Access to over 20,000 investment options with easy plan design and installation.**

**Retirement Right Blueprint** provides customers with enhanced access to investment options, a more nimble plan quoting and installation process and ongoing support through an up-to-date, easy-to-use client interface. By simplifying the customer experience, our clients can free up resources to focus on other business issues. This is especially true for the thousands of employers now faced with state mandates to offer a retirement plan to their employees.

## **Embedded Financial Wellness**

**Because Mutual of Omaha believes in helping every customer imagine, plan and secure their financial future, Retirement Right Blueprint** offers financial wellness tools that are seamlessly embedded in the client experience with every plan at no additional cost. These tools can be accessed by financial professionals, plan sponsors and participants.

## **Financial Wellness Tools**



### **iJoin<sup>®</sup>**

Starting from enrollment, the iJoin tool provides ongoing retirement plan support and answers the three most asked questions: How much will I need to retire? How much should I be saving? How can I make retirement planning easier?



### **Imagine Retirement Right<sup>SM</sup>**

Our proprietary employee-engagement workshops help employees envision their retirement dreams and increase plan enrollment and contributions.



### **Financial Finesse**

An award-winning financial wellness tool proven to reduce financial stress, advance financial health and improve retirement readiness.

## Accelerated Plan Installation

Most retirement plans take months to get up and running once a proposal is approved. But with **Retirement Right Blueprint**, we've created a technology-based platform that takes months of work and compresses it into just days without sacrificing the comprehensive plan design support we're known for.

The interactive installation portal makes designing a plan simple and intuitive and enables seamless collaboration between Mutual of Omaha, the financial professional and plan sponsor. By accelerating the sometimes tedious and time-consuming efforts for all parties involved, we're able to put financial professionals and plan sponsors back in the driver's seat to get their retirement plan up and running on their timetable. In addition, **Retirement Right Blueprint** includes expanded payroll integration with future enhancements already in the works.

## Additional Value Adds

**Retirement Right Blueprint** is simple, easy and intuitive. Each financial professional and client, regardless of plan size, has access to a variety of value-added services.

- 1 Single Point of Contact:** Rather than a call center, our clients have a dedicated relationship manager assigned to their plan with direct access for service-related needs.
- 2 Work. Save. Retire:** An easy-to-navigate mobile app for 24/7 access to a participant's retirement account with a variety of retirement planning capabilities, which are available in Spanish.
- 3 Fiduciary Services:** ERISA fiduciary requirements can be overwhelming. We offer services that meet ERISA Sections 3(16), 3(21) and 3(38) requirements.
- 4 Multilingual Participant Website:** iJoin language capabilities include English, Spanish, French and Mandarin.
- 5 ModelXChange®:** A cutting-edge managed account solution for financial professionals to set up and easily manage investment models for individual 401(k) plans with the flexibility to reuse these models across various retirement providers.

We are here for you

For more information about Retirement Right Blueprint, contact your Mutual of Omaha representative or call (877) 401-7253.



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