

Welcome to Ascensus.

We've been here for you all along.

As you recently heard from Mutual of Omaha, after more than two decades of successful partnership, Mutual of Omaha will be transitioning their defined contribution retirement plan business to Ascensus. As a result, your plan will transition to Ascensus on July 1, 2024.

The only action you need to take now

Because your plan is already being serviced by Ascensus, there is little action you need to take. However, you will need to review the email we will send to you on April 1, and follow the instructions provided.

We have already been supporting you and your employees by providing retirement plan administrative services on behalf of Mutual of Omaha. Rest assured, you can look forward to the same flexible plan and exceptional service from the team you know and trust—with a new brand and some exciting enhancements.

Ensuring a smooth experience for you and your employees is our top priority, so we'll continue partnering closely with the Mutual of Omaha team until we officially welcome you on July 1.

We help people save for a better future.



We're here to help

The same Ascensus client service representative who has been servicing your plan will continue to be here for you. If you have questions about the Ascensus product or what your plan services will be post-transition, contact the Ascensus client service team at 888-917-7120, or at 866-810-0184 for Individual(k)TM plans.

The best is yet to come

Your plan's best interests guide everything we do—and you can rely on us to communicate with transparency, do the right thing, and deliver results that align to your goals. That's our promise, and it's how we live our Core Values of People Matter. Quality First. Integrity Always.®

We look forward to continuing to serve your plan.



\$760+ billion
in total assets under administration¹



4.8+ million
retirement plan participants¹



\$391+ billion
in retirement assets under administration¹



154,900+
retirement plans administered¹

World-Class Service from a Recognized Industry Leader

Top 10 in JD Power Retirement Plan Digital Experience

for customer satisfaction²

Nation's largest

independent retirement recordkeeper³

2022

Retirement Leader of the Year⁴

Net Promoter Scores & Retention

+81 NPS for employer satisfaction¹
97% client retention⁵

2024 PLANADVISER Adviser Choice Awards⁶

Winner in the Recordkeeping Category

¹Net Promoter Score (NPS) is a well-established metric that gauges client satisfaction by comparing the percentage of very satisfied customers (called Promoters) to the percentage of very dissatisfied customers (called Detractors). As of December 31, 2023; NPS Ranges from -100 to +100; > 0: Good, > 50: Excellent, > 70: World-Class

¹As of December 31, 2023

²JD POWER 2023 U.S. Retirement Plan Digital Experience Study. September 2023.

³Cerulli Associates. *The Cerulli Report: U.S. Retirement Markets 2023*. December 2023.

⁴With Intelligence. With Intelligence Mutual Fund & ETF Awards. June 2022.

⁵As of December 31, 2023. Excludes plan terminations and mergers and acquisitions.

⁶PLANADVISER. *2023 Retirement Plan Adviser Survey*. March 2024.

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