

# 2019 Client Satisfaction Survey

"Best-In-Class" Service Affirmed by Third-Party Research Firm, Chatham Partners

"Mutual of Omaha's **98% rating for Overall Satisfaction** from full-service clients places them among the leading firms in the industry."<sup>\*</sup> -CHATHAM PARTNERS, JULY 2019

Exceeded

23/23

Benchmarks In



Of Those, In  
11/23  
Attributes, Mutual of Omaha Was Top Performer



Of All Providers In the Benchmark

## Overall Impressions\*

- Overall Satisfaction (All Clients) 97%
- Provides High-Quality Service 95%
- Helps Fulfill Fiduciary Responsibilities 94%
- Offers Full Range of Services 94%
- Committed to Technology 93%
- Would Recommend to Others 92%
- Good Value for the Money 91%

## Products and Services\*

- Call Center Reps 98%
- Participant Statements 96%
- Plan Sponsor Services 96%
- Processing Employee Transactions 96%

## Quality of Service

Have you encountered any problems?

90%

No

Are you confident in Mutual of Omaha's ability to resolve problems?

98%

Yes



Underwritten by  
United of Omaha Life Insurance Company  
Companion Life Insurance Company  
Mutual of Omaha Affiliates

\*Based on a rating of five, six or seven on a seven-point scale. These ratings are considered "best-in-class" by Chatham Partners, a market research firm specializing in financial services. Chatham's proprietary industry benchmark includes 10 major plan providers.

## Simplicity

“

I wish there was a higher score than seven. All the Mutual of Omaha personnel are terrific!”

—————  
\$2.2MM  
FULL SERVICE PLAN

“

I can't praise the service enough that we receive from our Relationship Manager. She's exceptional, and we value the long-standing relationship with her.”

—————  
\$3.2MM  
FULL SERVICE PLAN

“

This team is so knowledgeable and always willing to help. And it's always easy to get a hold of someone.”

—————  
\$3.9MM  
FULL SERVICE PLAN

## Ease of Doing Business

“

We like the improved investment technology, introduction of Admin Advantage, and increased investment options.”

—————  
\$0.2MM  
FULL SERVICE PLAN

“

I like the friendly and professional email reminders regarding year-end process from our Relationship Manager. I feel much more calm and confident knowing she is there to guide me through every step of the process.”

—————  
\$1.7MM  
FULL SERVICE PLAN

“

The management of the plan has become easier and Mutual of Omaha's support is excellent.”

—————  
\$3.6MM  
FULL SERVICE PLAN

“

Working in a partnership, we have streamlined our enrollment process considerably.”

—————  
\$29.7MM  
FULL SERVICE PLAN

## Peace of Mind

“

I like to know that I can pick up the phone and get help or questions answered. Calls are always answered promptly and they know what they are doing! They are very knowledgeable.”

—————  
\$0.6MM  
TPA PLAN

“

Customer service from the broker and the internal customer service staff is immediate and exceptional.”

—————  
\$2.4MM  
TPA PLAN

“

We have always received excellent service from Mutual of Omaha. They are quick to answer any questions and have been happy to assist us with any problems we may have.”

—————  
\$4.0MM  
TPA PLAN

Mutual of Omaha commissioned Chatham Partners to conduct a client satisfaction survey among customers of United of Omaha Life Insurance Company and Companion Life Insurance Company, which was conducted in May 2019 with a response rate of 23%. Survey results are limited to those expressing an opinion. Chatham Partners is an independent research firm and is not affiliated with Mutual of Omaha or any of its affiliated entities.

Mutual of Omaha Retirement Services is a marketing name for the Retirement Plans Division of Mutual of Omaha Insurance Company.