

Providing Detailed Installation Timelines

Every installation will get a detailed timeline indicating what should happen from start to finish. Below, you will find a sample installation timeline for transfer plans. This 60-day process may be longer based on prior carrier requirements. For new plans with no prior provider, blackout notices, blackout dates, asset transfers, etc. do not apply.

PLAN INSTALLATION ACTIVITY	TIMING	RESPONSIBLE PARTY
Provide Current Plan Document and Next Steps Document	Day 1	Client
Notification Letter Sent to Prior Provider	Day 1	Mutual of Omaha and Client
Plan Document Review	Day 3	Mutual of Omaha
Installation Forms Delivered to Trustee	Day 4	Mutual of Omaha
Installation Forms Signed and Returned	Day 7	Client
Call with Prior Provider	Day 10	Mutual of Omaha
Plan Installation Call (1-2 hours)	Day 16	Mutual of Omaha and Client
Provide Employee Census File	Day 17	Client
Blackout, QDIA, Fee Disclosure Notices Delivered	Day 17	Client
Payroll Call	Day 24	Mutual of Omaha and Client
Enrollment Meeting(s) (1 hour/meeting)	Day 27	Mutual of Omaha and Employees
Enrollment Window	Days 27–40	Client
Blackout Starts	Day 40	Mutual of Omaha
Asset Transfer from Prior Provider	Day 46	Mutual of Omaha and Prior Provider
Assets Received	Day 47	Mutual of Omaha
First Payroll Submitted	Day 51	Client
Prior Provider Financial Records Received	Day 55	Prior Provider
Participant Accounts Rebalanced	Day 59	Mutual of Omaha
Blackout Complete	Day 60	Mutual of Omaha
Plan Goes Live	Day 60	Mutual of Omaha and Client