

Mutual of Omaha PlanSource Advantage (PSA) Program

For purposes of the Mutual of Omaha PSA Program:

“Mutual of Omaha” means United of Omaha Life Insurance Company.

“Eligible Employer Groups” means those employer groups to whom PlanSource provides certain services under a written agreement, and who may elect to purchase certain Eligible Product Lines under the PSA Program.

“Eligible Product Lines” means those Mutual of Omaha products that PlanSource will offer to Eligible Employer Groups under the PSA Program.

Under the PSA Program, Eligible Employer Groups may earn monetary credits for offering Eligible Product Lines to its employees. Credits to each Eligible Employer Group are based on each Eligible Product Line multiplied by the number of employees enrolled in each product. PlanSource will apply any credits earned under the Mutual of Omaha program to an Employer Group’s account in the month the group goes live on PlanSource, once the Eligible Employer Group’s information is uploaded into the PlanSource system and PlanSource and Mutual of Omaha have verified all enrollment information.

The Eligible Product Lines and respective credit amounts for the Mutual of Omaha program are listed below in Table 1, with additional notes below:

- Credits apply to new lines of business
- Credits apply in the month the group goes live on PlanSource
- Companies with 100+ employees are eligible

Table 1. Eligible Product Lines for Carrier

Eligible Product Line	Valid Geographic Markets	Valid Employer Sizes	Product Line Credit
Accident	All	100+ Employees	\$0.50
Basic Life and AD&D	All	100+ Employees	\$0.50
Critical Illness	All	100+ Employees	\$0.50
Long Term Disability	All	100+ Employees	\$0.50
Short Term Disability	All	100+ Employees	\$0.50
Voluntary Life and AD&D	All	100+ Employees	\$0.50
Voluntary Long Term Disability	All	100+ Employees	\$0.50
Voluntary Short Term Disability	All	100+ Employees	\$0.50