

# Mutual of Omaha Transition Rules

## The following transition rules will apply:

### ▪ Paper Applications

- DI Choice Portfolio applications received in the home office on or before June 10, 2022, will be processed as normal.
- DI Choice applications received after June 10, 2022, will not be accepted regardless of application sign date. Applications will be closed, and a new Mutual Income Solutions e-Application will be required to apply for disability income insurance coverage. **No exceptions will be made.**
- Pending applications will be processed as follows:
  - Pending DI Choice applications older than 60 days are no longer considered valid (will be incomplete), so after 60 days Underwriting will require a new e-App for the new product.
  - App Dating: Backdating is not allowed for DI Choice applications.
- If a client wants to change to the new product on or after June 1, 2022, a new e-Application is required for Mutual Income Solutions.

### ▪ Winflex

- DI Choice Portfolio products will be removed from Winflex effective June 1, 2022.

