

Keeping agents/advisors informed and updated on all things OMNI

Looking for new leads? Look no further....

Introducing OMNI's NEW Contact Feature for Preferred Provider Program (P3) Members

In OMNI's most recent Universal Availability notice distributed to all of our clients and their employees, we have introduced a new contact form on our website for employees of our clients to utilize. This will allow employees to reach out to providers that are exclusively members of our Preferred Provider Program (P3) to obtain more information on the investment options that are offered by their chosen provider(s). Participants can now fill out a short contact form and select one or more of the P3 providers on their plan sponsor's approved provider list. OMNI will receive the employee's contact information and pass it along to the applicable P3 providers.

In order to have your company added to the available providers for this new feature, please contact your corporate offices. Each P3 provider has a designated contact that sends OMNI all changes, updates and edits to our website. We cannot accept updates from any agents or advisors.

If the company you represent is not a P3 provider, it can apply via the P3 Application (https://omni403b.com/Files/P3_Application.pdf).



Meet Adam Edwards Service Provider Specialist

How long have you been with OMNI?

I have been with OMNI since May of 2017.

What are your main job functions?

I process Qualified Domestic Relations Orders (or QDROs) for our participants in the process of a divorce. I also handle transaction processing as a member of the Service Provider Team.

What do you enjoy the most about your job?

The challenge presented by divorce cases I handle. Each case is different, so they keep me engaged and interested.

What one thing financial advisors should know about OMNI's services?

OMNI's online transaction and SRA forms are the way to go! They ensure we have all of the information needed to approve transactions and process contribution changes for your clients.

What activities do you enjoy outside of work?

Outside of work I spend a lot of time hanging out with my dog, Bucket.

"As a QDRO specialist, Adam's ability to work with participants while processing quickly and accurately is an asset to both OMNI, our clients, and the participants with whom he interacts."

Zach Keep - Director of Compliance

To learn more contact U.S. OMNI,
M-F 7:30am - 8:00pm EST, 877.544.6664
or visit www.omni403b.com

Are you listed on our website?

OMNI offers an agent listing feature exclusively for our P3 members which allows your local agents to have their name, phone number, picture, e-mail address and website displayed on each organization's customized plan details page on OMNI's website. We have found this tool to be helpful for introducing new participants to representatives while completing online transactions such as a Salary Reduction Agreement form.



In order to have your information added, you must contact your corporate offices' designated P3 liaison who will provide OMNI with the updated information. We cannot accept updates from any agents or advisors.

