

# About OneAmerica Financial<sup>SM</sup>

A national financial services organization helping people build greater certainty for better moments, every day.

OneAmerica Financial<sup>SM</sup> is a national financial services organization helping people build greater certainty for better moments, every day. The companies of OneAmerica Financial have been advancing financial security for more than 145 years, supporting millions of customers with solutions across life insurance, retirement, employee benefits and long-term care. As a people-first mutual organization, OneAmerica Financial prioritizes customers' interests and maintains a long-term focus on both value and financial stability. For more information visit [OneAmerica.com](https://www.OneAmerica.com).

OneAmerica Financial<sup>SM</sup> is the marketing name for the companies of OneAmerica Financial.

## The companies of OneAmerica Financial

- American United Life Insurance Company® (AUL)
- The State Life Insurance Company®
- OneAmerica Retirement Services LLC
- McCready and Keene, Inc.
- OneAmerica Securities, Inc.
- Pioneer Mutual Life Insurance Company®, a stock subsidiary of American United Mutual Insurance Holding Company
- OneAmerica Asset Management, LLC
- AUL Reinsurance Management Services, LLC®

## Financial highlights

### 2023 OneAmerica Financial GAAP year-end highlights

<b>Assets under administration</b>	\$95.1 billion
<b>Revenue</b>	\$3,840.2 million
<b>Shareholder's equity</b>	\$1,747.4 million
<b>Net investment income</b>	\$1,213.2 million
<b>Net income</b>	\$126.8 million

These consolidated results include OneAmerica Financial Partners, Inc. and its subsidiaries. Assets under administration includes total GAAP assets plus assets administered by OneAmerica Financial companies including McCready and Keene, Inc. and OneAmerica Retirement Services LLC.

## Products and services offered by the companies of OneAmerica Financial Life Insurance

- Whole life insurance
  - Traditional whole life insurance
  - Limited-pay whole life insurance
- Variable universal life
- Asset-based long-term care products
- Level term life insurance
- Fixed annuities
  - Single premium immediate annuities
  - Single premium deferred annuities
  - Fixed indexed annuities

## Retirement

- 401(k), 403(b) and 457 plan administration
- Defined benefit
- Pension Risk Transfer
- Employee Stock Ownership Plan (ESOP)
- Non-qualified plans
- Plan design: Safe Harbor and new comparability
- Bundled and unbundled administration services
- Local support and national footprint
- Stable value management
- Stable value wrap
- Support customized allocation models built by Registered Investment Advisors (RIAs)

## Employee Benefits

- Employer-Paid and Voluntary
- Term Life with AD&D
- Employer-Paid and Voluntary Short-term Disability
- Employer-Paid and Voluntary Long-term Disability
- One Lump Sum Disability
- Absence Management Solutions
- Small Business Solutions
- Value Added Services
  - Employee Assistance Program (EAP)
  - Travel Assistance Services

**Note:** Products and financial services provided by the companies of OneAmerica Financial. Group annuity contracts are issued by AUL and registered variable universal and annuity products are distributed by OneAmerica Securities, Inc., a Registered Investment Advisor, Member FINRA, SIPC, One American Square, Indianapolis, IN 46282. Products issued and underwritten by American United Life Insurance Company® (AUL), a OneAmerica Financial company. Administrative and recordkeeping services provided by AUL or OneAmerica Retirement Services LLC, companies of OneAmerica Financial which are not broker/dealers or investment advisors. Employee Assistance Program (EAP) is offered and administered by ComPsych® Corporation under its GuidanceResources® brand. FMLA Administration is offered and administered by ComPsych Corporation or York. Travel Assistance Program is offered by On Call International®. ComPsych Corporation, York and On Call International are not affiliates of OneAmerica Financial and are not OneAmerica Financial companies.

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