SECURITY BENEFIT

Large Case Review

LARGE CASE REVIEW PARAMETERS

Any purchase, or combined purchases for all client accounts, greater than the limits indicated below must be reviewed by Security Benefit for pre-approval. For age-based determinations, approvals would be determined based on the client's age at time of issue. Any purchases below these amounts do not need a Large Case Review form and will be paid full compensation.

Product	Upfront Comp (Option A)		Trail Comp (Option B)		Maximum Premium Amounts
	Age 0–75	Age 76+	Age 0–75	Age 76+	
Strategic Growth	$3,000,000	$2,000,000	$5,000,000	$4,000,000	$5,000,000
Strategic Growth 7	$3,000,000	$2,000,000	$5,000,000	$4,000,000	$5,000,000
Strategic Growth Plus	$2,500,000	$1,500,000	$3,500,000	$2,500,000	$4,000,000

To proceed with a Large Case Review, Security Benefit would require the large case review form submitted for pre-approval. For the purposes of the review, the client signature can be left blank until the review has been completed.

Once pre-approval is received, the Large Case Review form must be signed by the Owner (and Joint Owner where applicable) and submitted with the client application.

We're here to help your clients
To and Through Retirement®.

Call us for more information at 800.747.5164, option 3,
or visit SBElitePartners.com.

FINANCIAL PROFESSIONAL USE ONLY – NOT FOR USE WITH CONSUMERS