

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
TopRidge Bonus	\$2,000,000	\$1,000,000	\$3,000,000	\$2,000,000	\$3,000,000

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.

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

FINANCIAL PROFESSIONAL USE ONLY – NOT FOR USE WITH CONSUMERS

Security Benefit Life Insurance Company is not a fiduciary and the information provided is not intended to be investment advice. This information is general in nature and intended for use with the general public. For additional information, including any specific advice or recommendations, please visit with your financial professional.

The Security Benefit Strategic Growth Series Annuities and Security Benefit TopRidge Bonus Annuity, modified single premium, deferred fixed index annuity contracts, are issued by Security Benefit Life Insurance Company (SBL). In most states, the Strategic Growth Series Annuities and TopRidge Bonus Annuity are issued on form 5600 (9-19). In Alaska, Connecticut, Idaho, Indiana, Maryland, Massachusetts, Minnesota, Missouri, Nevada, New Hampshire, New Jersey, Ohio, Oklahoma, Oregon, Pennsylvania, South Carolina, Texas, Utah, Virginia, and Washington the Strategic Growth Series Annuities and TopRidge Bonus Annuity form is ICC19 5600 (9-19).

Guarantees provided by annuities are subject to the financial strength of the issuing insurance company. Annuities are not FDIC or NCUA/NCUSIF insured; are not obligations or deposits of, and are not guaranteed or underwritten by any bank, savings and loan or credit

union or its affiliates; are unrelated to and not a condition of the provision or term of any banking service or activity.

Fixed index annuities are not stock market investments and do not directly participate in any equity, bond, other security, or commodities investments. Indices do not include dividends paid on the underlying stocks and therefore do not reflect the total return of the underlying stocks. Neither an index nor any fixed index annuity is comparable to a direct investment in the equity, bond, other security, or commodities markets.

Bonus annuities may include changes to the elements used to determine the index interest credits or changes to the interest rate that are not included in similar annuities without a bonus. These changes may include lower current interest rates, higher surrender charges, longer surrender charge periods, lower participation rates or caps, higher spreads, or other changes. The amount of charges or reduction of interest credits may exceed the amount of the bonus.

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