



SECURITY BENEFIT

SmartChoice

OPEN ARCHITECTURE MUTUAL FUND PLATFORM
FOR EMPLOYER SPONSORED PLANS



Making a Smart Choice

In overseeing your client's retirement plans, you want an industry-leading provider that has an experienced sales team with focused service and support. You want a provider with a single platform for all plan types, ensuring ease of use and a consistent experience. You want a provider that has more of what you need so you can deliver the very best to your clients with features and tools that make it easy and enjoyable for them to think about retirement.

As a financial professional, you want to deliver the best possible retirement savings experience for clients. SmartChoice's customizable components make it easy and enjoyable for individuals to think about and prepare for retirement.

The Security Benefit SmartChoice program was designed with those considerations in mind. SmartChoice is Security Benefit's first truly open architecture program, giving you the freedom to create a customized, diversified investment portfolio for each plan sponsor.

Advisor as Fiduciary

SmartChoice supports your plan fiduciary practice model and allows you to use your plan investment strategies for your small to mid-size ERISA plans with Security Benefit's recordkeeping platform. As plan fiduciary, you'll have access to a wide variety of mutual funds through our open architecture program.



Security Benefit provides access to more than 20,000 mutual funds.



Security Benefit also provides information to most third-party data aggregators and fiduciary platforms. We support unbundled TPA relationships and offer a bundled solution if required.



Every plan you place with us will have access to quarterly plan health reports, a health and wellness suite, a mobile app for participants, and electronic delivery of documents.

Mesirow Financial as Fiduciary

Even if you choose not to serve as a plan fiduciary, you can be assured that plan sponsors have a sound, well-managed retirement plan. SmartChoice offers an option to have Mesirow Financial assume the role of ERISA 3(21) or 3(38) Plan Investment Fiduciary and accept the liability of that role. These options are described more fully in the SmartChoice Fiduciary Options brochure.

My Security Benefit Mobile App¹

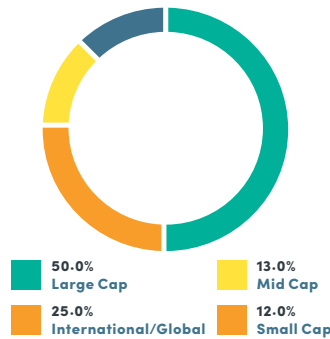
A unique feature to the SmartChoice program is the My Security Benefit mobile app that goes along with it.

This new app grants the user anytime, all-the-time, on-the-go access to their retirement account. Plan participants will be able to plan, view, and track their progress using tools within the app like the personalized retirement calculator. The calculator allows the user to determine their own personal “score” in real time to assess and optimize their retirement plan.

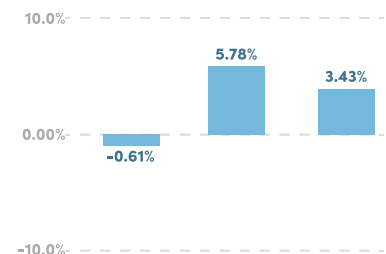
Features of the My Security Benefit app:



**Calculate and estimate
retirement income needs**



**View account holdings
and activity**



**View investment
performance and change
investments**

Financial and Health Wellness Suite

Built right into the app is a financial and health wellness suite that engages users and keeps them committed to their long-term retirement goals. With this functionality, users can take classes about financial and personal well-being that are tailored to their lifestyle, skills and interests. Plan participants can earn rewards² along the way like gift cards to popular retailers and subscription discounts.

¹ Available in the App Store and Google Play. The app is only available for client who have a mutual fund account with Security Benefit. Financial professionals who wish to see their book of business with Security Benefit should log in to their account at SecurityBenefit.com

² Rewards provided by a third party.

Additional Benefits From Security Benefit

We offer differentiating features designed to capture marketplace opportunities and complement your business needs:

Dedicated team of specialists with 65 years of combined experience

No proprietary funds; fixed account available¹

Customized pricing

3(16) Administrative Fiduciary services

Bundled or unbundled TPA options

Fi360 plan comparison reports

Quarterly plan investment report cards

Quarterly plan health reports

Quick paperless enrollment that can be completed in less than two minutes

¹The Security Benefit Group Fixed Account (also called "Fixed Account" or "Fixed Account Option") is a group unallocated fixed annuity contract issued by Security Benefit Life Insurance Company ("SBL"), policy form GV4586. The obligations under the Fixed Account are guaranteed by SBL's General Account in the event that the assets are not sufficient to meet the Fixed Account obligations. SBL is a subsidiary of Security Benefit.



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

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

FINANCIAL PROFESSIONAL USE ONLY - NOT FOR USE WITH CONSUMERS

Investment advisory services are provided by Mesirow Financial Investment Management, Inc., a registered investment advisor. Mesirow Financial refers to Mesirow Financial Holdings, Inc. and its divisions, subsidiaries and affiliates. The Mesirow Financial name and logo are registered service marks of Mesirow Financial Holdings, Inc. © 2012, Mesirow Financial Holdings, Inc. All rights reserved. Security Benefit and its subsidiaries are not affiliated with Mesirow Financial.

Security Benefit Smart Choice is a Trust Account under §401 or §457(g) of the Internal Revenue Code. Recordkeeping services are provided by Security Financial Resources, Inc., a subsidiary of Security Benefit Corporation (Security Benefit).



One Security Benefit Place | Topeka, KS 66636 | SecurityBenefit.com

SB-10000-24 2020/09/14