Security Benefit Advisory Platform Capabilities

The Security Benefit Advisory Platform offers flexible portfolio, fee and reporting tools that help save time so you can focus on your client relationships.

Manage Your Portfolios

- Transfer, reallocate, and set up future allocations
- Create groups of accounts based on product and account owner asset strategies
- With a single transaction, reallocate individual, group, or all active accounts
- Schedule recurring reallocations
- Build and maintain multiple asset allocation strategies
- Create and save custom asset-based strategies as a Model Portfolio to use in multiple transactions

Manage Your Fees

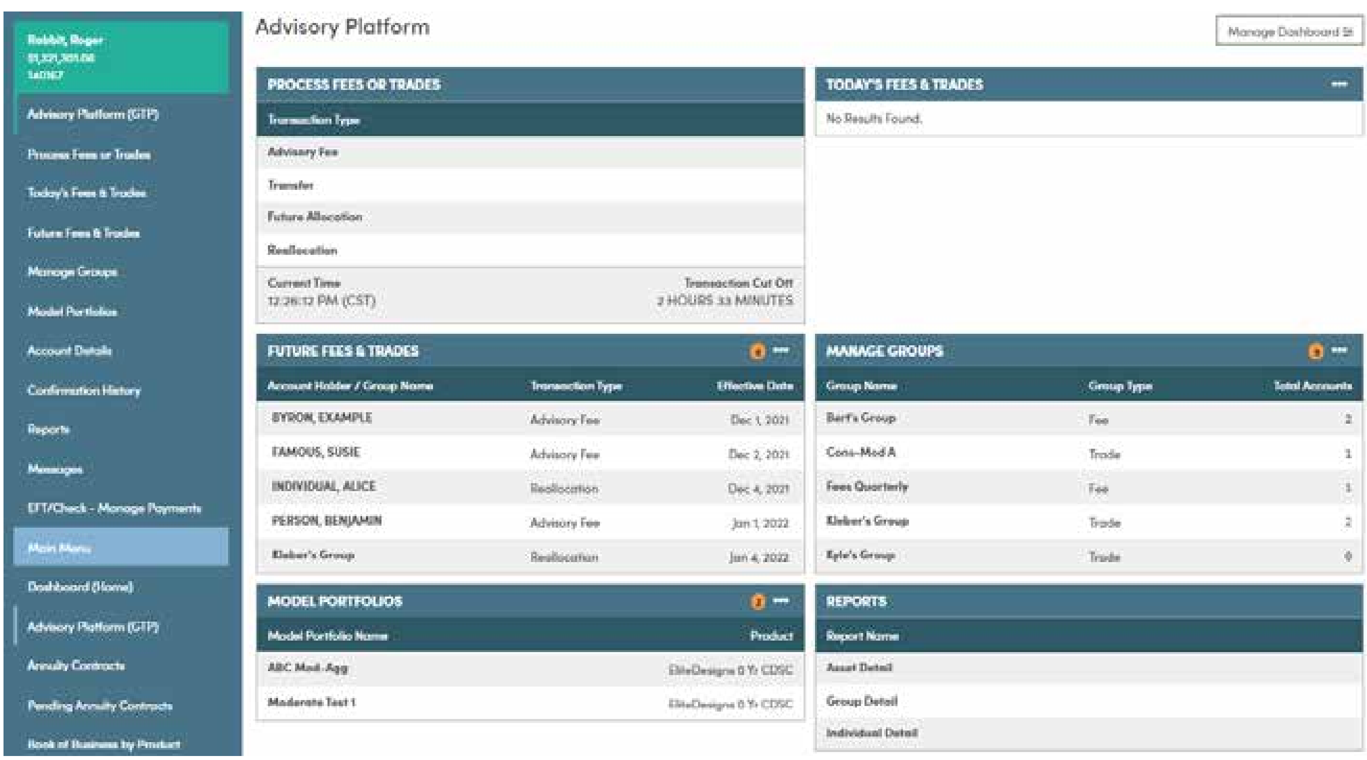
- Process your advisory fees* for an individual, group, or your entire block of business:
  - By percent or dollar amount
  - Deduct fees once or with a recurring frequency
  - Based on current assets or quarter-end assets
  - Deduct pro-rata or from individual funds
- Receive fees via EFT or check

Reporting Capabilities

- View these reports across your entire book of business
  - Asset Detail (by Fund or Client Account for a selected Fund)
  - Group Detail (Client Accounts and Assets by Group)
  - Individual Detail (by Account or Funds by Account)

* Advisory fees you process on the Platform are based on a completed Investment Advisor Authorization form by each client for whom you process fees.

Use the Advisor Dashboard to quickly transact business, see current fees and trades, manage future fees and trades, manage your groups, and manage your payments.



Security Benefit®

FINANCIAL PROFESSIONAL USE ONLY
NOT FOR USE WITH CONSUMERS

Helping your clients
To and Through Retirement®

To register for the Security Benefit Advisory Platform, contact us at 800.747.5164, option 3 or visit SecurityBenefit.com.

FINANCIAL PROFESSIONAL USE ONLY – NOT FOR USE WITH CONSUMERS

Services are offered through **Security Distributors**, a subsidiary of Security Benefit Corporation (Security Benefit). Security Benefit and its subsidiaries/affiliates are not investment advisers. Use of the Security Benefit Advisory Platform provides a platform to facilitate asset reallocations and assessing fees. Asset reallocations and assessing fees are executed by you based on your agreement with your clients, and such transactions are not recommended, authorized or approved by Security Benefit in any way.

Security Benefit®
TO AND THROUGH RETIREMENT

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

SB-10009-04 | 2021/12/06