



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.

The screenshot displays the 'Advisory Platform' dashboard. On the left is a navigation menu with options like 'Rabbit, Roger', 'Advisory Platform (GTP)', 'Process Fees or Trades', 'Today's Fees & Trades', 'Future Fees & Trades', 'Manage Groups', 'Model Portfolios', 'Account Details', 'Confirmation History', 'Reports', 'Messages', 'EFT/Check - Manage Payments', 'Main Menu', 'Dashboard (Home)', 'Advisory Platform (GTP)', 'Annuity Contracts', 'Pending Annuity Contracts', and 'Book of Business by Product'. The main content area is divided into several sections:

- PROCESS FEES OR TRADES:** Includes fields for Transaction Type, Advisory Fee, Transfer, Future Allocation, and Reallocation. It also shows 'Current Time: 12:26:12 PM (CST)' and 'Transaction Cut Off: 2 HOURS 33 MINUTES'.
- TODAY'S FEES & TRADES:** Shows 'No Results Found'.
- FUTURE FEES & TRADES:** A table listing transactions:

Account Holder / Group Name	Transaction Type	Effective Date
BYRON, EXAMPLE	Advisory Fee	Dec 1, 2021
FAMOUS, SUSIE	Advisory Fee	Dec 2, 2021
INDIVIDUAL, ALICE	Reallocation	Dec 4, 2021
PERSON, BENJAMIN	Advisory Fee	Jan 1, 2022
Elaber's Group	Reallocation	Jan 4, 2022
- MANAGE GROUPS:** A table listing groups:

Group Name	Group Type	Total Accounts
Bert's Group	Fee	2
Cons-Mod A	Trade	1
Fees Quarterly	Fee	1
Elaber's Group	Trade	2
Eyle's Group	Trade	0
- MODEL PORTFOLIOS:** A table listing model portfolios:

Model Portfolio Name	Product
ABC Mod-Agg	EliteDesigns 0 Yr CD5C
Moderate Test 1	EliteDesigns 0 Yr CD5C
- REPORTS:** A list of report types: Asset Detail, Group Detail, and Individual Detail.

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.