



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.

Robbitt, Roger

\$1,321,301.68

1407167

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

Book of Business by Product

Advisory Platform

Manage Dashboard

PROCESS FEES OR TRADES

Transaction Type

Advisory Fee

Transfer

Future Allocation

Reallocation

Current Time: 12:26:12 PM (CST)

Transaction Cut Off: 2 HOURS 33 MINUTES

FUTURE FEES & TRADES

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
Elleber's Group	Reallocation	Jan 4, 2022

MODEL PORTFOLIOS

Model Portfolio Name	Product
ABC Mod-Agg	EliteDesigns 0 Yr CDSC
Moderate Test 1	EliteDesigns 0 Yr CDSC

TODAY'S FEES & TRADES

No Results Found.

MANAGE GROUPS

Group Name	Group Type	Total Accounts
Bert's Group	Fee	2
Cons-Mod A	Trade	1
Fees Quarterly	Fee	1
Elleber's Group	Trade	2
Eyle's Group	Trade	0

REPORTS

Report Name
Asset Detail
Group Detail
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.

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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.