

SecurePoint Retirement Program

How do you help employers manage their retirement?

Key features

- 3(38) Fiduciary Services with Mesirow Financial[®] Fund Monitoring
- [Over 30 investment options](#) selected by Mesirow Financial
- Investment comparison reports
- Bundled services program for small employers

Security Benefit has partnered with [Mesirow Financial[®]](#) to create Security Benefit SecurePoint. Mesirow Financial is the contracted 3(38) investment fiduciary to plan sponsors who choose SecurePoint, and is also responsible for the selection, monitoring, and replacement of investments under the plan.

Employers are ultimately held responsible for the investment options offered within their retirement plan. But, ERISA law does allow for that responsibility to be transferred to an independent third-party.

The Security Benefit SecurePoint program transfers the investment fiduciary obligation and the associated liability to Mesirow Financial, an independent investment manager. Mesirow Financial is experienced in interpreting fiduciary requirements and contractually agrees to become the 3(38) fiduciary for your plan.

In addition to the 3(38) Fiduciary Services, Security Benefit provides the tools you need with our comparison reports. This will give you information to use with employers to see if their current plan investment line-up meets the fiduciary standard of care.

- [No-cost Comprehensive Plan Review](#)
- [Performance](#)

At a glance

Product name: SecurePoint Retirement Program

Product type: Mutual Fund

Minimum Purchase: Employer Plans with total assets \$2 million and under

Account Type(s): 401(a)

Surrender Charges:

Strategy:

[Download the Fact Sheet](#)

[Compare Product](#)

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The Security Benefit SecurePoint Retirement 401(k) and 401(a) products are Trust Accounts under §401 of the Internal Revenue Code. The SecurePoint Retirement 403(b)(7) ERISA product is a Custodial Account under §403(b)(7) of the Internal Revenue Code. The SecurePoint Retirement 457(b) Tax Exempt product is a Trust Account under §457(g) of the Internal Revenue Code.

The Mesirow Financial Investment Strategies division of Mesirow Financial Investment Management, Inc., an SEC-registered investment advisor (Mesirow Financial) has provided the following investment option information as a result of its qualitative and quantitative research process. It is the participant's responsibility to select which investment options from this list meet the participant's investment objectives and risk tolerances as Mesirow Financial has not selected these investment options on the participant's behalf. Mesirow Financial retains all rights, title and interest in and to any pictorial, narrative or other written or graphical presentation of all other material contained herein. The Mesirow Financial name and logo are registered service marks of Mesirow Financial Holdings, Inc. © 2023, Mesirow Financial Holdings, Inc. All rights reserved.

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