

In Good Order Guidelines

At Security Benefit, we have the same goals for each new business application you write.

If you follow the checklist below, you can be assured each new business application will be complete and then processed by us in the specified time.

Please mail the completed application and forms to:

Security Benefit
P.O. Box 750497
Topeka, KS 66675-0497

In Good Order Requirements¹:

- Fully completed application
- Original, signed Incoming Funds Request form, including a signature guarantee if required by the transferring company
- Annuity Suitability form (see state note below)
- Statement of Understanding (SOU)/Disclosure document if submitting a fixed or fixed index annuity
- [State Replacement form](#) and [Sales Literature Confirmation form](#) if transfer is replacing an existing annuity
- Non-resident form if the contract is signed in a state other than the one in which the applicant lives
- State-specific forms (if applicable)

You may consider contacting the transferring company to identify additional requirements.

Certain forms, including the Statement of Understanding (SOU), [State Replacement](#), and other State-specific forms must be fully completed, originals sent to Security Benefit and copies provided to the client and kept in the financial professional's file.

¹These are the requirements Security Benefit has established to submit In Good Order. All issued contracts must be suitable investments. Your State may have additional required forms. Certain products may require additional forms. Check with your [internal sales consultant](#) for more information.