

Conducting Client Business Electronically

Security Benefit is here to help you assist your clients with their retirement savings aspirations. To that end, we'd like to share information that might be beneficial to you regarding electronic signatures and online capabilities to enhance your client relationships and business practices being alert to the fact that this information is subject to modification as regulatory issues and notices associated with electronic processes continue.

E-signature Vendors

As more business transactions are being captured and completed electronically, e-signature capabilities have become a necessity in the financial services industry to make transactions operationally more efficient. While many financial professionals and their clients prefer to meet in person, we realize it's not always feasible to do so.

To accommodate the time constraints of you and your clients, we accept e-signature solutions to help you easily execute and expedite applications. Several companies offer technology enabling individuals to provide e-signatures on any device with internet access to quickly and securely complete applications and obtain approvals using identity authentication measures (e.g., use of PIN or unique login username and password) in conformance with compliance requirements.

Before using e-signature technology, please make sure you adhere to your firm or broker-dealer's requirements and follow the rules and requirements necessitated by any approved sales platforms and software products. To submit e-signatures to Security Benefit, your firm must have a license with a platform/service as well as a license from one of the approved e-signature vendors listed below.

We accept e-signature applications from the following vendors as long as the audit trail is provided:

- DocuSign — [DocuSign.com](https://www.docuSign.com)
- FireLight — [InsuranceTechnologies.com](https://www.insuranceTechnologies.com)
- SIGNiX — [SIGNiX.com](https://www.signix.com)

Online Tools to Assist With Practice Management Efficiency and Effectiveness

Four vendors we use are dedicated to helping financial professionals facilitate applications, reduce compliance risk, and enhance the overall efficiency and effectiveness of their practice management through comprehensive sales platforms.

For Annuity New Business

- Affirm — [iPipeline.com](https://www.ipipeline.com)
- AnnuityNet — [Ebix.com](https://www.ebix.com)
- FireLight — [InsuranceTechnologies.com](https://www.insurancetechnologies.com)

For Annuity and Mutual Fund New Business and Service Forms

- Laser App — [LaserApp.com](https://www.laserapp.com)

It's important that financial professionals follow all of the instructions on all new business and service forms and provide any additional documents that might be required.

Application Acceptance Methods

We accept e-signature applications in the following ways:

Fax

- Annuity Operations: 785.368.1772
- Mutual Fund Custodial Operations: 816.701.7626

Email

- Annuity Operations: AAWF-FI@SecurityBenefit.com
- Mutual Fund Custodial Operations: SecurityBenefit@DSTSystems.com



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Related Resources

- [Virtual Business as an Alternative to Face-to-Face Appointments](#)
- [Common Questions and Answers](#)

FINANCIAL PROFESSIONAL USE ONLY — NOT FOR USE WITH CONSUMERS