

Conducting Client Business Electronically

As more business becomes electronic, e-signature capabilities have become a necessity in the financial services industry to insure efficiency. While many financial professionals and their clients prefer to meet in person, we realize it's not always feasible to do so.

E-signature Vendors

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:

- [Acrobat Sign](#)
- [DocuSign](#)
- [FireLight](#)
- [SIGNiX](#)

Online Tools to Assist With Practice Management Efficiency and Effectiveness

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](#)
- [AnnuityNet](#)
- [FireLight](#)

For Annuity and Mutual Fund New Business and Service Forms

- [Laser App](#)
- [QUIK!](#)

It's important that financial professionals follow all instructions on 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:

Secure File Upload

- Upload files through our website at securitybenefit.com/secure-file-upload.

Fax

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

Email

- Annuity Operations: AnnuityProcessing@SecurityBenefit.com
- Mutual Fund Custodial Operations: SecurityBenefit@SSCInc.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