

Onboarding checklist

Now that you're appointed, please complete these additional steps before submitting an annuity application.

Step 1: Register for your online access on SecurityBenefit.com.

Our secure platform allows you to:

- Access your clients' accounts.
- Obtain information about [how to conduct business electronically](#) with Security Benefit.
- Obtain client-approved presentations, sales ideas, and a series of booklets on various topics to help you build your brand and strengthen relationships with your clients.
- [Order sales materials](#).
- Subscribe to email notifications to stay informed about product updates and receive bi-weekly rate updates for fixed and fixed index annuities.

Step 2: Review suitability and compliance requirements.

- [Advertising Policies and Procedures](#)
- [Anti-money Laundering Training](#)
- [NAIC Suitability Model Requirements](#)
- [RegEd](#).

Step 3: Submit business in good order.

To help us serve you better, please include your ID on all applications and correspondence with us. This ID was provided in your welcome email.

Once the contract has been issued, you can call our Customer Service Center at 800.888.2461 or our Sales Team at 800.747.5164, option 3.