

## Making a Smart Choice

**All great chefs have their “secret recipes.” With Security Benefit’s SmartChoice, financial professionals have the ability to leverage our expanded investment menu to design a plan’s investment lineup to meet their fiduciary value proposition and plan clients' needs.**



The menu is complemented by a wide array of client services designed to help you create your own unique, secret recipe and grow your practice.

### **Open Architecture**

**SmartChoice’s open architecture investment menu gives you access to over 20,000 mutual funds.**

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**No Proprietary mutual funds from Security Benefit**

**Flexibility to bundle the plan's TPA services with Security Benefit or utilize an independent TPA**

**Platform consistency: one platform, multiple plan types**

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## Comprehensive Services

### Choose the complementing services that Fit Your Practice

- Flexible 3(38) or 3(21) fiduciary solutions to fit your practice by Mesirow Financial
  - Online Plan Sponsor access, reports, and approvals
  - Online participant access for account review and transactions
  - Online enrollment: Quick Enroll option that takes less than two minutes
  - Dedicated team of specialists with 65 years of combined experience
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## Exceptional Participant Experience

Plan participants can access their accounts on-the-go with the [My Security Benefit](#) mobile app. Beyond account access, My Security Benefit encourages your participants to stay on top of their retirement planning through calculators and other tools.

[Visit our mobile app resource center for Financial Professionals](#)

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## Creating Your Unique Client Menu

SmartChoice's lineup of services along with the [My Security Benefit](#) mobile app are designed to give you, plan sponsors, and participants unparalleled experiences that create just the right blend for your practice and clients.

## Get Started Today

If you would like to visit about SmartChoice or receive a Plan Proposal or comparison report, please contact one of our sales specialists at [800.747.5164](tel:800.747.5164), option 3, from 8 a.m. to 7 p.m. (Eastern Time), Monday through Friday.

## SmartChoice Materials

- [Brochure - Financial Professionals](#)
- [Brochure - Fiduciary Options](#)
- [Brochure - Plan Sponsors](#)

## Related Products

- [SmartChoice](#)
- [SecurePoint](#)
- [Workplace Retirement](#)

### **FINANCIAL PROFESSIONAL USE ONLY — NOT FOR USE WITH CONSUMERS**

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