

# SmartChoice Retirement Program

**SmartChoice is designed to give financial professionals more.**

## Key features

- Fiduciary Services Options for ERISA Plans:
  - Advisor-based Fiduciary Services – allows the advisor to serve as 3(21) or 3(38) ERISA Investment Fiduciary.
  - Outsourced Fiduciary Services from Mesirow Financial – allows Mesirow Financial to serve as the 3(21) or 3(38) ERISA Investment Fiduciary.
  - Administrative 3(16) Fiduciary Services
- Open Architecture
  - Access to over 20,000 mutual funds
  - No proprietary mutual fund requirements
- TPA
  - Flexibility to use any TPA or bundled with Security Benefit

## Standard Features for Every Plan

- Platform Consistency: one platform, multiple plan types
- Plan Sponsor access, reports, approvals online
- Participant online access for account review and transactions
- Participant Managed Account option from Morningstar
- Online Enrollment: Quick Enroll Option
- [My Security Benefit mobile app](#) for SmartChoice participants to view and manage their accounts

More options in funds, more compatibility with different platforms, and more services for employers and their retirement plans.

**If you would like information about SmartChoice, a plan proposal, or a comparison report, please contact one of our sales specialists at [800.888.2461](tel:800.888.2461), option 3, from 8 a.m. to 7 p.m. (Eastern Time), Monday through Friday.**

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\*To receive your free comparison report, please have ready: Recent Plan Level Quarterly Report; Fee Disclosure Documents, 408(b)(2) and 404(a)(5); and TPA Invoice (for 5500 form).

# At a glance

**Product name:** SmartChoice Retirement Program  
**Product type:** Mutual Fund  
**Minimum Purchase:** Employer Plans with total assets above \$2 million.  
**Account Type(s):** 401(a)  
**Surrender Charges:**  
**Strategy:** Choose from a broad set of investment options to build a custom lineup for employer based retirement plans

[Download the Brochure](#)  
[Compare Product](#)

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