

SmartChoice Retirement Program

SmartChoice is designed to give plan sponsors and participants more.

Key features

- [My Security Benefit mobile app](#) for participants
- Participant financial health and wellness suite
- Quarterly Plan Health Reports Standard Features for Every Plan
- Plan Sponsor access, reports, approvals online
- Participant online access for account review and transactions
- Participant Managed Account option from Morningstar
- Online Enrollment Option
- No proprietary funds; fixed account available
- Quarterly plan investment report cards
- Plan-level fiduciary services for ERISA plans

SmartChoice is designed to give plan sponsors and participants more. More options in funds, more features and tools, and more services to help your employees set the foundation for their retirement.

It's a program that's customized for your needs with features designed to engage your employees in their retirement like never before.

At a glance

Product name: SmartChoice Retirement Program

Product type: Mutual Fund

Minimum Purchase: Employer Plans with total assets over \$2 million

Account Type(s): 401(a)

Surrender Charges:

Strategy:

Work with a financial professional to develop a set of fund options

[Download the Brochure](#)

[Compare Product](#)

Investment advisory services are provided by Mesirow Financial Investment Management, Inc., a registered investment advisor. Mesirow Financial refers to Mesirow Financial Holdings, Inc. and its divisions, subsidiaries and affiliates. The Mesirow Financial name and logo are registered service marks of Mesirow Financial Holdings, Inc. © 2012, Mesirow Financial Holdings, Inc. All rights reserved. Security Benefit and its subsidiaries are not affiliated with Mesirow Financial.

Security Benefit Smart Choice is a Trust Account under §401 or §457(g) of the Internal Revenue Code. The Security Benefit Smart Choice 403(b)(7) is a Custodial Account under §403(b)(7) of the Internal Revenue Code. Record keeping services are provided by Security Financial Resources, Inc., a subsidiary of Security Benefit Corporation (Security Benefit).