


Selling Foundations Annuity

We're here to help clients understand how FIAs work. From client-friendly presentations to sales ideas that explain FIA concepts, we can help bridge your clients' knowledge gap.

You must first become appointed with Security Benefit and complete the required Foundations product training before selling Foundations. After completion, you'll have access to our custom illustration tool that builds hypothetical contract performance for your clients.

Note: Your Broker-Dealer must approve Foundations.




The image shows a presentation slide titled "Protection When You Need It Most" from Security Benefit Life Insurance Company. It is a "Foundations Annuity Accumulation and Income Case Study". The slide features a photograph of an older man and a woman. Below the title, there are bullet points: "Are today's volatile equity and bond markets of concern?", "Looking for ways to protect, but also grow retirement savings?", and "Looking for more reliable sources of income in retirement?". The slide is divided into five sections: "HEAD START", "GUARANTEED PROTECTION", "INTEREST-EARNING POWER", "ACCESS TO FUNDS", and "LEGACY PLANNING". The "INTEREST-EARNING POWER" section includes a table titled "Interest-earning Power: How Index Crediting Strategies Work" with columns for "CHANGE IN INDEX VALUE", "YOUR INTEREST CREDIT", and "YOUR INTEREST CREDIT". The table shows that for a 10% increase in index value, the interest credit is 1.0% (10% Index Change x 100% Participation Rate). For a 5% increase, the interest credit is 0.5% (5% Index Change x 100% Participation Rate). For a 0% change, the interest credit is 0.0% (0% Index Change x 100% Participation Rate). For a -5% decrease, the interest credit is -0.5% (-5% Index Change x 100% Participation Rate). The slide also includes a QR code and a "Consult your professional" button.

Foundations Annuity Accumulation and Income Case Study

- Are today's volatile equity and bond markets of concern?
- Looking for ways to protect, but also grow retirement savings?
- Looking for more reliable sources of income in retirement?

This case study examines how a 50/50 allocation into our most recent Annual Point to Point Index Account additions compare to a traditional 60/40 investment portfolio.

 [Download Consumer-friendly Case Study](#)



When Is Zero Your Hero?

- This sales idea demonstrates how a 0% floor in Foundations can be a "hero" when it comes to protection and accumulation.
- On average, these index accounts delivered positive interest credits nearly 80% of the time.

This sales idea looks at the hypothetical calendar-year and daily rolling interest credits of all the Annual Point to Point Index accounts offered in Foundations Annuity.



[Download Consumer-friendly Sales Idea](#)

PRODUCT VIDEOS

Below are short client-friendly videos to watch or share that explain the product and how interest credits are applied.

Foundations Overview

S&P 500[®] Annual Point to Point Index Account

S&P 500[®] Annual Average Index Account

S&P 500[®] Monthly Sum Index Account

S&P 500[®] Factor Rotator Daily RC2 7% Index Account



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S&P 500[®] Low Vol. Daily Risk Control 5% Index Account

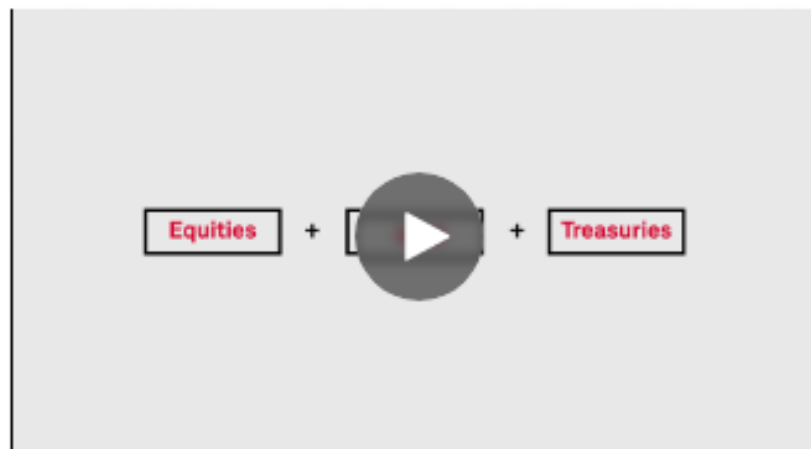


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S&P Multi-Asset Risk Control (MARC) 5% Index



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Morningstar Wide Moat Focus Barclays 7% Index



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Foundations Resources

- [Foundations Annuity](#)
- [Foundations Brochure](#)
- [Foundations Fact Sheet](#)
- [Foundations Rate Sheet](#)
- [Foundations: Locked in Interest Sales Idea](#)
- [Run a Client Illustration](#)
- [Order Sales Materials](#)
- [Build an Application](#)

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