

Coming Soon! Security Benefit Advisory Platform

We are excited to announce that our Group Trading Platform (GTP) is being upgraded into our new Security Benefit Advisory Platform on June 21. Along with a new look and feel, you will have additional capabilities through our platform including the ability to:

- Schedule recurring fees and trades
- Add and store ACH information for fee processing

As a current user of GTP, the transition will be seamless and the groups you’ve previously created will be retained. To help improve efficiencies, the enhanced platform will require you to identify new Groups to be either a Fee or Trade Group. Your previously established Groups will default to a Trade Group, unless prior activity clearly indicates it is a Fee Group.

The planned cut-off date for the Group Trading Platform will be 6 p.m. (Eastern), Friday, June 18.

The Security Benefit Advisory Platform will offer streamlined administrative tools including flexible portfolio, fee and reporting tools that help save time so you can focus on your client relationships.

Manage Your Portfolios



- Transfer, reallocate, and set up future allocations
- Create account Groups based on product and account owner asset strategies
- With a single transaction, reallocate individual, Group, or all active accounts
- Schedule recurring reallocations
- Build and maintain multiple asset allocation strategies

Manage Your Fees

Process your advisory fees* for an individual, Group, or your entire block of business:



- By percent or dollar amount
- Deduct fees once or with a recurring frequency
- Based on current assets or quarter-end assets
- Deduct pro-rata or from individual funds
- Receive fees via EFT or check

*Advisory fees you process on the Platform are based on a completed Investment Advisor Authorization form by each client for whom you process fees.

- [Advisory Platform Capabilities Guide \(PDF\)](#)
- [Trading Rules \(PDF\)](#)

FINANCIAL PROFESSIONAL USE ONLY — NOT FOR USE WITH CONSUMERS

Services are offered through **Security Distributors**, a subsidiary of Security Benefit Corporation (Security Benefit). Security Benefit and its subsidiaries are not affiliated with the NEA.

Asset reallocations and assessing fees are executed by you based on your agreement with your clients, and such transactions are not recommended, authorized or approved by Security Benefit in any way.