

# I'm a financial professional. How do I register for an online account on SecurityBenefit.com?

## Website Support

Navigate to SecurityBenefit.com and click on [Register](#) within the upper menu.



On the next screen, select which type of website user you are to begin the registration process.

## Welcome to Security Benefit

### Choose Role

- ☐ **Individual**  
You have mutual fund, fixed, fixed index, or variable annuity accounts with Security Benefit.
- ☒ **Financial Professional**  
You provide expert financial guidance to clients.
- ☐ **Employer**  
You are a plan sponsor who manages employee retirement plans.

To register for an online account on SecurityBenefit.com, you must be an appointed Financial Professional with Security Benefit.

Are you appointed to sell products with us? \*

- ☐ Yes
- ☐ No

### Create Online Account

### Setup Authentication

#### Benefits of your new online account access includes:

- View and manage client accounts and contract status.
- Assign and manage delegated associates.
- Submit private documents via secure document portal.
- Keep your online account secure through identity verification with [ID.me](#).

\* ID.me is an independent third-party vendor not affiliated with Security Benefit.

Once your role has been chosen, you'll be asked to fill in all required fields.


# Welcome to Security Benefit

- ✓ Choose Role
- Create Online Account
- Setup Authentication

## Before You Get Started

Visit our [Registration & Login FAQs](#) for more information.

\* Indicates required fields.

|                                                                                               |                                                                                                                   |
|-----------------------------------------------------------------------------------------------|-------------------------------------------------------------------------------------------------------------------|
| First Name *                                                                                  | Last Name *                                                                                                       |
| <input type="text"/>                                                                          | <input type="text"/>                                                                                              |
| Last 4 digits of Social Security Number (Example: 1234) *                                     | Date of Birth *<br>mm/dd/yyyy  |
| <input type="text"/>                                                                          | <input type="text"/>                                                                                              |
| Email Address - (Please use the email address associated with your account, when possible.) * | Re-enter Email Address *                                                                                          |
| <input type="text"/>                                                                          | <input type="text"/>                                                                                              |
| Username - (At least 8 characters and no special characters) *                                | Broker-Dealer or Firm Name                                                                                        |
| <input type="text"/>                                                                          | <input type="text"/>                                                                                              |
| External ID                                                                                   | Account/Contract Number                                                                                           |
| <input type="text"/>                                                                          | <input type="text"/>                                                                                              |
| <div>BACK</div>                                                                               | <div>SUBMIT</div>                                                                                                 |

When you have successfully entered information into all required fields, the registration process is almost complete and you should see this screen. If you need to, you can navigate away from this page.

# Welcome to Security Benefit

✓ Choose Role

Create Online Account

Setup Authentication

Your registration is almost complete!

Thank you for your online account registration. Your request is being processed and you will receive an email to finalize the activation of your account within 1-2 business days.

If you have questions or need assistance, please contact our Service Center at 800.888.2461 between the hours of 8 a.m. – 7 p.m. (Eastern time).

Within 1-2 business days, check your email account used in the initial registration process for a confirmation email (the email will come from do-not-reply@securitybenefitinfo.com). When it arrives, you will have 7 days to open it and click the link to finalize the account registration process, which includes:

- Setting up a password,
- Setting up security questions, and
- Entering a cell phone and/or landline phone number for multi-factor authentication.

## Continue Registration

✓ Choose Role

Create Online Account

Setup Authentication

Your registration is nearly complete. Click the button below to set your password, security questions, and multi-factor authentication.

COMPLETE MY REGISTRATION

Once you click "Complete my Registration", you will be asked to create a password. Passwords must contain:

- At least 12 characters
- At least 1 number
- At least 1 lowercase letter
- At least 1 uppercase letter
- At least 1 special character

- Does not contain part of the username

You will also be asked to choose a recovery question in the event of needing to reset a password or gain access when you have forgotten a password.

# Create a Password

✓ Choose Role

Create Online Account

Setup Authentication

\* Indicates required fields.

New Password \*

Re-enter New Password \*

Password Requirements

- ✗ At least 12 characters
- ✗ At least 1 number
- ✗ At least 1 lowercase letter
- ✗ At least 1 uppercase letter
- ✗ At least 1 special character
- ✗ Does not contain part of username

Recovery Question

Choose a forgot password question \*

- Select -

Answer to Recover Question (At least 4 characters) \*

NEXT

After successfully establishing a password and setting a recovery question, you will need to set up additional security verification numbers, either a text message or a voice call with verification code to any number you choose.

For text verification, enter your 10-digit cell phone number without the country prefix. Please do not enter hyphens or parentheses. Click on the “Send Text” button to verify the device. Please allow up to 30 seconds to receive the text.

To set up voice call verification, enter your 10-digit phone number without the country prefix. Please do not enter hyphens or parentheses. Click on the “Call” button to verify the phone number. Please allow a few minutes to receive your voice call.



# Security Settings

- ✓ Choose Role
- ✓ Create Online Account
- Setup Authentication

## Sign In Verification Code Setup

Enter your Mobile number for Text verification or your Phone number for Voice Call verification (at least one is required). You can update these at any time in My Profile.

### Set Up Text Verification

Country

United States

▼

Select the country where your phone is registered.

Mobile number

Enter your 10-digit phone number without the country prefix. Please do not enter hyphens or parentheses.

SEND TEXT

### Set Up Voice Call Verification

Country

United States

▼

Select the country where your phone is registered.

Phone number

Enter your 10-digit phone number without the country prefix. Please do not enter hyphens or parentheses.

Extension

CALL

If you selected text verification, this screen will appear and you can enter the verification code sent via SMS to your cell phone. Enter the code and click on the “Verify” button. Once verified, your cell phone number will allow you to receive a verification code to access the site if you are signing in from a new device, or signing in one year or more after your last sign in.

# Security Settings

Verification code was sent to your device.

✓ Choose Role

✓ Create Online Account

Setup Authentication

## Sign In Verification Code Setup

Enter your Mobile number for Text verification or your Phone number for Voice Call verification (at least one is required). You can update these at any time in My Profile.

### Set Up Text Verification

Enter the verification code received on your device.

Verification Code

< BACK

VERIFY

### Set Up Voice Call Verification

SIGN IN

If you selected voice call verification, this screen will appear and you can enter the verification code received via a voice call to the number you entered. Enter the code and click on the “Verify” button. Once verified, your phone number will allow you to receive a verification code via voice call to access the site if you are signing in from a new device, or signing in one year or more after your last sign in.



# Security Settings

You should receive a voice call with the verification code.

- ✓ Choose Role
- ✓ Create Online Account
- Setup Authentication

## Sign In Verification Code Setup

Enter your Mobile number for Text verification or your Phone number for Voice Call verification (at least one is required). You can update these at any time in My Profile.

Set Up Text Verification

Set Up Voice Call Verification

Enter the code received on your phone.

Verification Code

BACK

VERIFY

SIGN IN

When you have entered the verification code, this screen will appear which confirms the number that has been established for your profile.

After you have completed the ID.me verification process, if you wish to change a phone number, simply sign in to your account, navigate to [My Profile](#) in the upper right navigation and edit your profile information.

# Security Settings

✓ Choose Role

✓ Create Online Account

✓ Setup Authentication

## Sign In Verification Code Setup

Enter your Mobile number for Text verification or your Phone number for Voice Call verification (at least one is required). You can update these at any time in My Profile.

### Set Up Text Verification

A text message has been established for:

Select the "SIGN IN" button below to continue.

To change your number, please sign in and select My Profile in the top navigation to edit your profile.

### Set Up Voice Call Verification

SIGN IN

Your account set up is now complete. By clicking the "Sign In" button you can enter your credentials and access the website.

**If you should have any questions or encounter any issues in registering, please call our Service Center at [800.888.2461](tel:800.888.2461) from 8 a.m. to 7 p.m. (Eastern Time), Monday through Friday.**