## 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 <u>Register</u> 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	oose Role Create Online Account	
Individual You have mutual fund, fixed, fixed index, or variable annuity account	ints with Security Benefit.	Benefits of your new online account access includes:
<ul> <li>Financial Professional You provide expert financial guidance to clients.</li> <li>Employer You are a plan sponsor who manages employee retirement plans.</li> </ul>		<ul> <li>View and manage client accounts and contract status.</li> <li>Assign and manage delegated associates.</li> <li>Submit private documents via secure document portal.</li> <li>Keep your online account secure through identity verifices.</li> </ul>
To register for an online account on SecurityBenefit.com, y Financial Professional with Security Benefit.	ou must be an appointed	* ID.me is an independent third-party vendor not affiliated v
Are you appointed to sell products with us? *		
O Yes		
O No		

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

identity verification with ID.me.

not affiliated with Security Benefit.

## Welcome to Security Benefit

✓ Choose Role	Create Online Account		Setup Authentication	
Before You Get Started				
Visit our <u>Registration &amp; Login FAQs</u> for more information.				
* Indicates required fields.				
First Name *		Last Name *		
Last 4 digits of Social Security Number (Example: 1234) *		mm/dd/yyyy		
Email Address – (Please use the email address associated with you	r account, when possible.) *	Re-enter Email Address *		
Username – (At least 8 characters and no special characters) *		Broker-Dealer or Firm Name		
External ID		Account/Contract Number		
BACK SUBMIT				

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 Accou	int	Setup Authentication
* Indicates required fields.			
New Password *		Password Requirements X At least 12 characters	
	۲	X At least 1 number	
Re-enter New Password *		X At least 1 uppercase letter	
	0	X Does not contain part of use	ername
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 n	ot 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 n	ot enter hyphens or parentheses.
Extension	

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

SIGN IN

Verification code was sent to your dev	vice.	
✓ Choose Role	Create Online Account	Setup Authentication
Sign In Verification Code Set	tup	
Enter your Mobile number for Text verif	ication or your Phone number for Voice Call verification (at least	one is required). You can update these at any tim
Set Up Text Verification		
Enter the verification code received	on your device.	
Verification Code		

< BACK	VERIFY		
Set Up Voice Call Verificat	tion		

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.

ne in My Profile.



## Security Settings

You should receive a voice call with the verif	ication 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	t one is required). You can update these at any time i
Set Up Text Verification		
Set Up Voice Call Verification Enter the code received on your phone.		
Verification Code		
BACK	FY	
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.

### in My Profile.

## 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 from 8 a.m. to 7 p.m. (Eastern Time), Monday through Friday.

