New Website Enhancements for Representatives

Security Benefit has rolled out several new website features as part of a broad digital transformation program designed to improve the experience for financial professionals.

Watch the video below to learn how you can use these new features today.

Document Center for Financial Professionals

Client Statements and Correspondence Going Paperless for Financial Professionals

Security Benefit offers more paperless options than ever before. This helps protect client accounts from mail fraud, benefits the environment, and improves operational efficiencies. While documents will no longer be sent to you by mail, they are available in the document center online to view at your convenience.

Statements

Client correspondence and forms are available in the document center within your account at SecurityBenefit.com. Financial professionals have access to three years of client statements, up from 18 months previously.

These upgrades will also provide enhanced search functionality to simplify the process and improve your experience. You can search for client information by contract number, contract owner, and wildcard. The page will have an enhanced filter that will also allow you access to documents by type and title (e.g., Anniversary Statement or Confirmation) in addition to the quarter and date range options already available.

Additional Documents Available Online

In addition to statements, we have expanded our online document center to provide fast, easy, and flexible access while reducing the need to manage paper documents for clients. Other documents available online include:

- transaction confirmations (including purchases and transfers)
- renewal notices and rates for fixed annuity contracts
- other account changes (e.g., beneficiary and address changes)

Secure File Upload

Secure File Upload allows reps to send annuity and mutual fund documents safely and securely for new and existing clients. You can find the Secure File Upload page within Quick Links, on the Rep Resources drop down menu in the main navigation, and through client accounts.

Users are allowed to upload:

- PDFs
- JPG or JPEGs
- An unlimited number of files, but cannot exceed a total upload size of 25 MB

All documents are screened for malicious activity. Any documents that are not safe or exceed the maximum size will be rejected by the system.
For more information, visit our website on using Secure File Upload.

Additional Enhancements

Account Delegation

Financial Professionals can add delegates to access their book of business on SecurityBenefit.com. Account delegation allows office and administrative staff to access client information. The delegation function allows the delegate to set up and access the website through their own, separate set of credentials.

Delegates will have access to:

- Sales materials, applications, and forms to process business and account changes.
- Client information to view and update.
- Search, view, and download client correspondence sent from Security Benefit.
- Review business processing status for new annuity applications and contracts.

Financial professionals can ***add and remove*** delegates from accessing their book of business at any time, as well as assign multiple delegates to their accounts.

Currently, the delegation feature is only available between financial professionals and their staff. Financial professionals cannot designate access to another registered financial professional at this time.