

401(k) Plan Comparisons from Security Benefit

If you aren't aware of how your plan's investments may have changed over time, you could be at risk for fiduciary problems.

That's why Security Benefit offers a comprehensive review of your 401(k) plan's investment line-up, free of charge. We can evaluate and benchmark your plan on nine fiduciary criteria. This is a way to identify problems related to the investment line-up of your plans without doing complicated analysis on your own.



Security Benefit's comparison reports evaluate funds performance in relation to their peers. Funds that do not rank well among peers may not be appropriate for inclusion into a retirement plan. This is important for you, as the adviser, because if your investment line-up includes funds with fiduciary problems, you will either need to justify their inclusion or provide a methodology for their removal. If not, you could be at risk for violations of fiduciary standards of care.

We provide free comparisons to our [Workplace Retirement ERISA](#) program and [Security Benefit SecurePoint Retirement](#) program, evaluated on the same fiduciary criteria. SecurePoint and Workplace Retirement use Mesirow Financial as an independent investment manager. Mesirow Financial selects and monitors the investment line-up, transferring the fiduciary investment risk from you and the plan sponsor. In addition to this risk transfer, it also provides a well-managed plan on a number of key criteria.

Sign up for a no-cost comprehensive plan review. Call our Service Center at [800.888.2461](tel:800.888.2461), option 3.

Services offered through **Security Distributors**, a subsidiary of Security Benefit Corporation (Security Benefit).

SB-10033-33 | 2023-06-15