

## **Conducting Client Business Electronically**

As more business becomes electronic, e-signature capabilities have become a necessity in the financial services industry to insure efficiency. While many financial professionals and their clients prefer to meet in person, we realize it's not always feasible to do so.

### **E-signature Vendors**

To submit e-signatures to Security Benefit, your firm must have a license with a platform/service as well as a license from one of the approved e-signature vendors listed below.

**We accept e-signature applications from the following vendors as long as the audit trail is provided:**

- [Acrobat Sign](#)
- [DocuSign](#)
- [FireLight](#)
- [SIGNiX](#)

### **Online Tools to Assist With Practice Management Efficiency and Effectiveness**

Vendors we use are dedicated to helping financial professionals facilitate applications, reduce compliance risk, and enhance the overall efficiency and effectiveness of their practice management through comprehensive sales platforms.

### **For Annuity New Business**

- [Affirm](#)
- [AnnuityNet](#)
- [FireLight](#)

### **For Annuity and Mutual Fund New Business and Service Forms**

- [Laser App](#)
- [QUIK!](#)

It's important that financial professionals follow all instructions on new business and service forms and provide any additional documents that might be required.

## Application Acceptance Methods

We accept e-signature applications in the following ways:

### Secure File Upload

- Upload files through our website at [securitybenefit.com/secure-file-upload](https://securitybenefit.com/secure-file-upload).

### Fax

- Annuity Operations: 785.368.1772
- Mutual Fund Custodial Operations: 816.701.7626

### Email

- Annuity Operations: [AnnuityProcessing@SecurityBenefit.com](mailto:AnnuityProcessing@SecurityBenefit.com)
- Mutual Fund Custodial Operations: [SecurityBenefit@DSTSystems.com](mailto:SecurityBenefit@DSTSystems.com)



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## Related Resources

- [Virtual Business as an Alternative to Face-to-Face Appointments](#)
- [Common Questions and Answers](#)

**FINANCIAL PROFESSIONAL USE ONLY — NOT FOR USE WITH CONSUMERS**