

# SmartChoice Retirement Program

**SmartChoice is designed to give plan sponsors and participants more.**

Key features

- [My Security Benefit mobile app](#) for participants
- Quarterly Plan Health Reports Standard Features for Every Plan
- Plan Sponsor access, reports, approvals online
- Participant online access for account review and transactions
- Participant Managed Account option from Morningstar
- Online Enrollment Option
- No proprietary funds; fixed account available
- Quarterly plan investment report cards
- Plan-level fiduciary services for ERISA plans

SmartChoice is designed to give plan sponsors and participants more. More options in funds, more features and tools, and more services to help your employees set the foundation for their retirement.

It's a program that's customized for your needs with features designed to engage your employees in their retirement like never before.

## At a glance

**Product name:** SmartChoice Retirement Program

**Product type:** Mutual Fund

**Minimum Purchase:** Employer Plans with total assets over \$2 million

**Account Type(s):** 401(a)

**Surrender Charges:**

**Strategy:** Work with a financial professional to develop a set of fund options

[Download the Brochure](#)

[Compare Product](#)

Investment advisory services are provided by Mesirow Financial Investment Management, Inc., a registered investment advisor. Mesirow Financial refers to Mesirow Financial Holdings, Inc. and its divisions, subsidiaries and affiliates. The Mesirow Financial name and logo are registered service marks of Mesirow Financial Holdings, Inc. © 2012, Mesirow Financial Holdings, Inc. All rights reserved. Security Benefit and its subsidiaries are not affiliated with Mesirow Financial.

The Security Benefit SmartChoice Retirement Program for ERISA Plans 401(k) and 401(a) products are Trust Accounts under §401 of the Internal Revenue Code. The Security Benefit SmartChoice Retirement Program for ERISA Plans 403(b)(7) ERISA product is a Custodial Account under §403(b)(7) of the Internal Revenue Code.

Recordkeeping services are provided by Security Financial Resources, Inc., a subsidiary of Security Benefit Corporation (Security Benefit).

SB-10039-40 | 2023-10-09