

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](#)

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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.

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