Foundations Annuity

How can Foundations Annuity, a fixed index annuity, help your clients weather today's market conditions?

Key features

Accumulation potential paired with protection against all market loss is a safe and smart strategy for your risk-averse clients nearing or already in retirement. With Foundations, your clients can choose from any combination of a Fixed Account or 11 index crediting strategies to help build a portion of their retirement savings, without risk.

- 1% Bonus on first-year Purchase Payments
- Participation in a portion of positive Index-linked gains
- Protection from all market loss
- Preservation of Principal
- 10% Free Withdrawals[1]

Foundations Overview See how the Foundations Annuity works to preserve principal while allowing for accumulation. Fact Sheet Brochure Rate Sheet Get Appointed State Variations Share This Video		

Index Account Strategies

S&P 500® Annual Point to Point Index Account

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S&P 500® Annual Average Index Account

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S&P 500® Monthly Sum Index Account		S&P 500® Factor Rotator Daily RC2 7% Index Account
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S&P 500® Low Volatility Daily Risk Control 5% Index Account		S&P Multi-Asset Risk Control (MARC) 5% Index **Multi-Asset Risk Control Index Account**
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Morningstar Wide Moat Focus Barclays VC 7% Index

Morningstar Wide Moat Barclays VC Index

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Index Information

[1]After the first contract anniversary and during the surrender charge period, clients can withdraw up to 10% of Account Value, free of surrender charges or market value adjustments.

	**SELLING FOUNDATIONS** The first steps in selling Foundations: 1. Check with your Broker-Dealer to see if Foundations is approved 2. Get Appointed with Security Benefit 3. Complete Product Training FIAs don’t have to be complicated, and with Foundations, we’ve created content to help make it easier to educate your clients on how the product works, from client-friendly presentations to sales ideas. Use the resources linked below to start conversations with your clients. Selling Foundations

Notes
Not available in New York.

At a glance

Product name: Foundations Annuity
Product type: Fixed Index Annuity
Minimum Purchase: $25,000
Account Type(s): 403(b)
Surrender Charges: 5-year; 7-year
Strategy: 11 Index Accounts + Fixed Account

Download the Fact Sheet
Download the Brochure
Compare Product

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