

SFR Program

Security Benefit offers the industry's best standards for plan governance for workplace retirement plans with our SFR employer plan.

Key features

- **Investment Practices Statement (IPS)** — An IPS puts a defined process in place to monitor the funds within the plan and select the funds for the plan.
- **Streamlined** and smart approach to plan maintenance
- **Quarterly Report Cards** show detailed fund performance
- **Automatic Fund Mapping** replaces underperforming funds
- **Automatic Dollar Cost Averaging** allows participants to consolidate accounts without investing into the market all at once.
- **Automatic Asset Reallocation** automatically rebalances investment portfolios to ensure portfolios stay within the intended risk range.
- **[Over 50 Investment Options](#)**

With over 50 Investment Options for employers to choose from, and an investment management system which includes an Investment Practices Statement, SFR provides a streamlined approach to monitoring funds for the employer. It also outlines plan governance which allows you more time to work with the participants instead of spending time analyzing and replacing under-performing funds at the plan level.

At a glance

Product name: SFR Program

Product type: Mutual Fund

Minimum Purchase: \$25 per pay

Account Type(s): 401(a) Governmental

Surrender Charges:

Strategy: Over 50 Investment Options and an Investment Management System with PlanTools

[Download the Fact Sheet](#)

[Compare Product](#)

FINANCIAL PROFESSIONAL USE ONLY — NOT FOR USE WITH CONSUMERS

The SFR 401(k) and 401(a) Programs are Trust Accounts under §401 of the Internal Revenue Code. The SFR 403(b)(7) ERISA and 403(b)(7) Voluntary Programs are Custodial Accounts under §403(b)(7) of the Internal Revenue Code.

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