

SmartChoice Retirement Program

SmartChoice is designed to give financial professionals more.

Key features

- Fiduciary Services Options for ERISA Plans:
 - Advisor-based Fiduciary Services – allows the advisor to serve as 3(21) or 3(38) ERISA Investment Fiduciary.
 - Outsourced Fiduciary Services from Mesirow Financial – allows Mesirow Financial to serve as the 3(21) or 3(38) ERISA Investment Fiduciary.
 - Administrative 3(16) Fiduciary Services
- Open Architecture
 - Access to over 20,000 mutual funds
 - No proprietary mutual fund requirements
- TPA
 - Flexibility to use any TPA or bundled with Security Benefit

Standard Features for Every Plan

- Platform Consistency: one platform, multiple plan types
- Plan Sponsor access, reports, approvals online
- Participant online access for account review and transactions
- Participant Managed Account option from Morningstar
- Online Enrollment: Quick Enroll Option
- [My Security Benefit mobile app](#) for SmartChoice participants to view and manage their accounts

More options in funds, more compatibility with different platforms, and more services for employers and their retirement plans.

If you would like information about SmartChoice, a plan proposal, or a comparison report, please contact one of our sales specialists at [800.888.2461](tel:800.888.2461), option 3, from 8 a.m. to 7 p.m. (Eastern Time), Monday through Friday.

*To receive your free comparison report, please have ready: Recent Plan Level Quarterly Report; Fee Disclosure Documents, 408(b)(2) and 404(a)(5); and TPA Invoice (for 5500 form).

At a glance

Product name: SmartChoice Retirement Program

Product type: Mutual Fund

Minimum Purchase: Employer Plans with total assets above \$2 million.

Account Type(s): 401(a)

Surrender Charges:

Strategy: Choose from a broad set of investment options to build a custom lineup for employer based retirement plans

[Download the Brochure](#)

[Compare Product](#)

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