

Selling Foundations Annuity

We're here to help clients understand how FIAs work. From client-friendly presentations to sales ideas that explain FIA concepts, we can help bridge your clients' knowledge gap.

You must first become appointed with Security Benefit and complete the required Foundations product training before selling Foundations. After completion, you'll have access to our custom illustration tool that builds hypothetical contract performance for your clients.

Note: Your Broker-Dealer must approve Foundations.



Foundations Annuity Accumulation and Income Case Study

- Are today's volatile equity and bond markets of concern?
- Looking for ways to protect, but also grow retirement savings?
- Looking for more reliable sources of income in retirement?

This case study examines how a 50/50 allocation into our most recent Annual Point to Point Index Account additions compare to a traditional 60/40 investment portfolio.



[Download Consumer-friendly Case Study](#)

Foundations Overview

S&P 500[®] Annual Point to Point Index Account

S&P 500[®] Annual Average Index Account

S&P 500[®] Monthly Sum Index Account

S&P 500[®] Factor Rotator Daily RC2 7% Index Account

S&P 500[®] Low Vol. Daily Risk Control 5% Index Account



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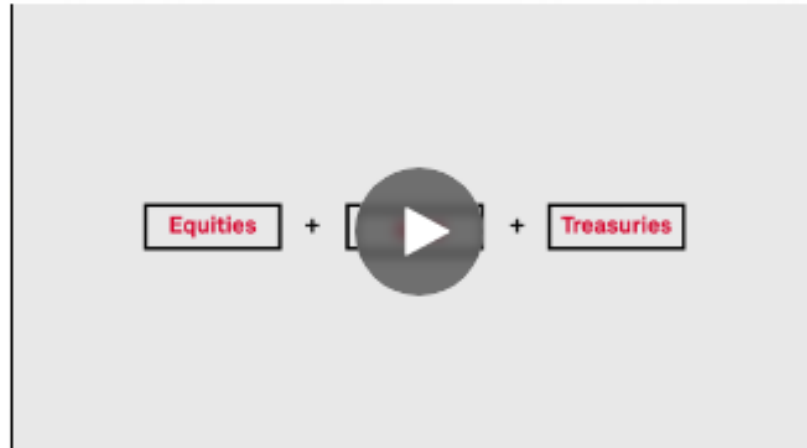


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S&P Multi-Asset Risk Control (MARC) 5% Index



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Morningstar Wide Moat Focus Barclays 7% Index



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- [Foundations Brochure](#)
- [Foundations Fact Sheet](#)
- [Foundations Rate Sheet](#)
- [Foundations: Locked in Interest Sales Idea](#)
- [Run a Client Illustration](#)
- [Order Sales Materials](#)
- [Build an Application](#)

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