

RateTrack® Annuity

Do you want to help your conservative clients preserve principal and still participate automatically if rates rise?

Key features

- [RateTrack® Annuity](#) is tied to the 3 Month CME Term SOFR Reference Rate.

RateTrack® Annuity, the industry's first floating rate annuity, offers unprecedented potential for automatic interest rate increases as rates rise without incurring market risk.

What is RateTrack[®] Annuity?

This short video shows how the RateTrack[®] Annuity's innovative floating rate component works.

RateTrack[®] Annuity as a Bond Alternative

When rates rise, bond values tend to fall. RateTrack[®] Annuity could help preserve their principal with potential for interest. Learn more from this short video.

If you're curious about how interest rates and floating rates have performed in the past, our Floating Rate Tool highlights historical performance so you can track movement and determine whether the RateTrack® Annuity might be a good option for a portion of your clients' savings.

- Go to Floating Rate Tool

Let Security Benefit assist you and your clients by taking advantage of our RateTrack[®] Annuity solution.

- [Rate Sheet](#)
- [State Variations](#)
- [Read more about the benefits of RateTrack[®]](#)
- [Get Appointed](#)

Notes

Not available in New York.

At a glance

Product name: RateTrack® Annuity

Product type: Fixed Annuity

Minimum Purchase: \$10,000

Account Type(s): 403(b)

Surrender Charges: 5-year Term; 7-year Term

Strategy: Floating Rate Annuity

[Download the Fact Sheet](#)

[Download the Brochure](#)

[Compare Product](#)

FINANCIAL PROFESSIONAL USE ONLY — NOT FOR USE WITH CONSUMERS

Guarantees provided by annuities are subject to the financial strength of the issuing insurance company. Annuities are not FDIC or NCUA/NCUSIF insured; are not obligations or deposits of and are not guaranteed or underwritten by any bank, savings and loan, or credit union or its affiliates; and are unrelated to and not a condition of the provision or term of any banking service or activity.

The Security Benefit RateTrack® Annuity, form ICC15 5300 (12-15) and 5300 (12-15), a single premium deferred fixed annuity, is issued by Security Benefit Life Insurance Company. Product features, limitations, and availability vary by state.

The market data ("Information") contained herein: (i) includes the proprietary information of Chicago Mercantile Exchange Inc. or its licensors, as applicable; (ii) may not be copied, sold, or further disseminated except as specifically authorized; (iii) does not constitute investment advice; (iv) is provided solely for informational purposes; and (v) is not warranted to be complete, accurate, or timely.

CME GROUP MARKET DATA IS USED UNDER LICENSE AS A SOURCE OF INFORMATION FOR CERTAIN SECURITY BENEFIT LIFE INSURANCE COMPANY ("SBL") PRODUCTS. CME GROUP HAS NO OTHER CONNECTION TO SBL PRODUCTS AND SERVICES AND DOES NOT SPONSOR, ENDORSE, RECOMMEND, OR PROMOTE ANY SBL PRODUCTS OR SERVICES. CME GROUP HAS NO OBLIGATION OR LIABILITY IN CONNECTION WITH THE SBL PRODUCTS AND SERVICES. CME GROUP DOES NOT GUARANTEE THE ACCURACY AND/OR THE COMPLETENESS OF ANY MARKET DATA LICENSED TO SBL AND SHALL NOT HAVE ANY LIABILITY FOR ANY ERRORS, OMISSIONS, OR INTERRUPTIONS THEREIN. THERE ARE NO THIRD-PARTY BENEFICIARIES OF ANY AGREEMENTS OR ARRANGEMENTS BETWEEN CME GROUP AND SBL.

