# **Conducting Client Business Electronically**

As more business becomes electronic, e-signature capabilities have become a necessity in the financial services industry to insure efficiency. While many financial professionals and their clients prefer to meet in person, we realize it's not always feasible to do so.

#### **E-signature Vendors**

To submit e-signatures to Security Benefit, your firm must have a license with a platform/service as well as a license from one of the approved e-signature vendors listed below.

We accept e-signature applications from the following vendors as long as the audit trail is provided:

- Acrobat Sign
- DocuSign
- FireLight
- SIGNIX

#### **Online Tools to Assist With Practice Management Efficiency and Effectiveness**

Vendors we use are dedicated to helping financial professionals facilitate applications, reduce compliance risk, and enhance the overall efficiency and effectiveness of their practice management through comprehensive sales platforms.

#### **For Annuity New Business**

- Affirm
- AnnuityNet
- FireLight

#### For Annuity and Mutual Fund New Business and Service Forms

- Laser App
- QUIK!

It's important that financial professionals follow all instructions on new business and service forms and provide any additional documents that might be required.

#### **Application Acceptance Methods**

We accept e-signature applications in the following ways:

#### Secure File Upload

• Upload files through our website at <u>securitybenefit.com/secure-file-upload</u>.

#### Fax

- Annuity Operations: 785.368.1772
- Mutual Fund Custodial Operations: 816.701.7626

### Email

- Annuity Operations: <u>AnnuityProcessing@SecurityBenefit.com</u>
- Mutual Fund Custodial Operations: <u>SecurityBenefit@DSTSystems.com</u>



## **Related Resources**

- Virtual Business as an Alternative to Face-to-Face Appointments
- Common Questions and Answers

FINANCIAL PROFESSIONAL USE ONLY - NOT FOR USE WITH CONSUMERS

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